Nathaniel Lichfield and Partners

Planning Design Economics

RHONDDA CYNON TAFF COUNTY BOROUGH COUNCIL

LEISURE STUDY

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Nathaniel Lichfield & Partners Ltd
1st Floor, Westville House
Fitzalan Court
Cardiff CF24 0EL
T 029 2043 5880
F 029 2049 4081
E cardiff@nlpplanning.com
www.nlpplanning.com

Offices also in:
Manchester
London
Newcastle-upon-Tyne

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1.0 INTRODUCTION

Scope of Study

1.1 Nathaniel Lichfield and Partners have been appointed by Rhondda Cynon Taff County Borough Council to undertake an assessment of indoor leisure provision within the Borough.

1.2 This study builds on the findings of a baseline study which analysed the results of a household survey on leisure patterns across the Borough (undertaken by NEMS between 21st April 2008 – 5th May 2008) which considered the opinion of Borough residents on qualitative aspects of existing provision and the geographic pattern of leisure usage across the Borough.

Structure of Report

1.3 Section 2 of this report reviews current national trends in commercial leisure development and leisure time. This is supplemented by a review of specific market trends relating to cinema, bingo, nightclubs, restaurants and private health and leisure clubs. The socio-economic context of the Borough is also reviewed.

1.4 Section 3 sets out all relevant national, regional and local planning policy relating to culture and leisure. A number of non-planning documents are also relevant and have been reviewed as part of this section.

1.5 Section 4 summaries the findings of the NEMS householder survey of Borough residents.

1.6 Section 5 assesses whether there is a need for new indoor leisure facilities in the Borough presently and projecting forward to 2016, assessing quantitative, qualitative and spatial considerations.

1.7 Conclusions and recommendations are contained in Section 6.

2.0 REVIEW OF CURRENT TRENDS AT A NATIONAL LEVEL

Introduction

2.1 This section sets out the national trends in relation to leisure time and commercial leisure development. In addition this chapter provides a commentary on each specific market including cinema/multiplex, ten-pin bowling, bingo, nightclubs, private health and fitness clubs and restaurants, pubs and bars.

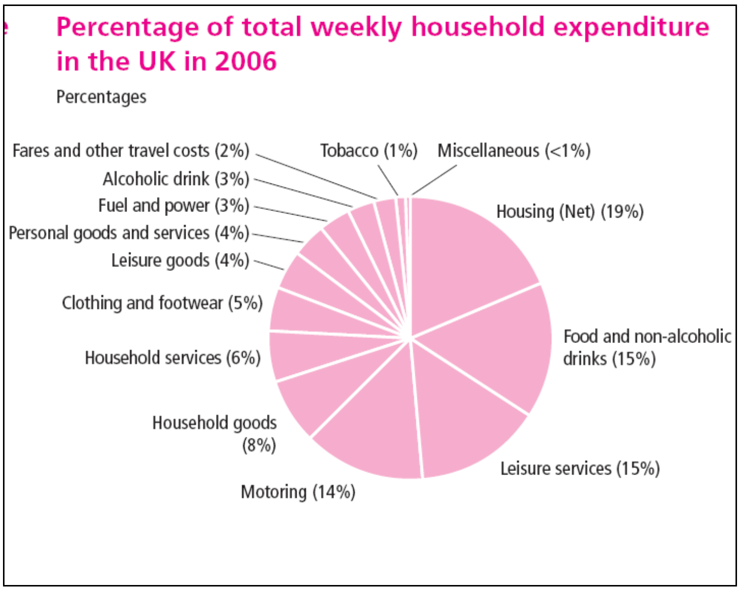
National Trends in Commercial Leisure Development

2.2 The demand for commercial leisure facilities has increased significantly during the last 20 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid 1990s.

2.3 Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: ONS Family Expenditure Survey). Further increasing by 46% between 1996 and 2006.

2.4 The latest (2006) average household expenditure on leisure services is 15% of the average weekly household expenditure (see figure 2.1 below). However, many analysts consider that the commercial leisure market has now reached saturation in some sub-sectors.

Figure 2.1: Percentage of total weekly household expenditure in the UK in 2006



(Source: ONS Family Spending, 2007 edition)

2.5 The mid-1990s saw the expansion of major leisure parks. These leisure parks are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks. Examples of major leisure parks are available in Nantgarw (Treforest Industrial Estate), Cardiff (Red Dragon Centre), Bridgend (MacArthur Glen Retail Park) and the new leisure project in Rhydycar, Merthyr Tydfil.

2.6 The cinema market remains an important sector because cinemas often anchor leisure developments, providing footfall for other uses. However, growth in this sector has slowed significantly in recent years with many areas reaching saturation levels. Consequently many cinema operators have suspended or curtailed their expansion plans. Some cinema operators such as City Screen, Mainline Pictures and Reeltime Cinemas have opened new or taken over small cinemas in recent years.

2.7 The expansion of other sectors has slowed, including ten-pin bowling and bingo. However, other sub-sectors have remained strong in recent years, in particular the private health and fitness market, with a number of multiple operators seeking premises across the UK, e.g. LA Fitness, Fitness First and Esporta. Nevertheless, the health and fitness sector is also reaching saturation point in some areas.

General National Leisure Trends

2.8 Mintel's latest (February 2006) report examines leisure time in the UK. Leisure time, in Mintel's report, is defined as "*free time in which the individual can do as they like*". The report investigates how much leisure time respondents have, what respondents tend to do with it, attitudes towards leisure time and consumer research comparing weekday and weekend leisure activities.

Demographics

2.9 There have been a number of demographic shifts in the UK population which are set to continue until 2010. These changes set the context for leisure time, in terms of how it is spent, how often it is enjoyed and attitudes towards it. The report found that the UK population is becoming older and more affluent. There has also been an increase in the number of 20-24 year-olds. In terms of the labour market, the percentage of people working long hours is gradually decreasing however the majority of people in the UK work for 31-45 hours per week.

What people do

2.10 Mintel found eating-out to have the biggest measure market whilst other growth areas included the cinema, computer/video games, sport and fitness (sports good retailing, private health clubs and fitness classes), pubs and live entertainment. The DVD/video retailing market has been a particular success and has more than doubled in 5 years.

The big (or small) screen

2.11 Visiting the cinema and watching rental/bought movies at home tends to be more popular the younger the respondent, peaking in the 18-24 age range and among the pre/no family life stage. It was found, particularly among 25-34 year-olds that watching rental/bought movies was preferred over visiting the cinema.

Time to play

2.12 Around half of all UK adults have less than 4 hours of leisure time on a typical weekday, whilst a fifth have more than ten hours. Women especially working mothers, workers and those with children are primarily those groups with least free time.

2.13 At the weekend, half of adults have more than 7 hours of leisure time per day, with a third having more than 10 hours. Part-time work and children were not surprisingly found to mean less weekend leisure time which again tends to affect women more than men.

Noteworthy changes

2.14 The report found a number of changes in the leisure industry that are likely to continue for the foreseeable future. Namely, lower prices and increased competition from supermarkets and online retailers.

2.15 As the UK moves more towards a 24-hour culture and work patterns are set to become more fluid the focus is moving away from leisure time predominantly in the evenings and at the weekends.

Market Commentary

Cinema/multiplex

2.16 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. The cinema industry reached a plateau in 2005 following a slight recovery in 2004 with a net gain of 24 operating screens (still a virtual standstill compared to the 100-200 screens added at the turn of the decade). Total admissions in 2006 were 157 million, slightly lower than in 2005 (164.6 million) and significantly lower than in 2004 (171.3 million, 2.86 visits per person).

2.17 Cinemagoing 16 published in March 2007 by Dodona Research reported that 2006 was a poor year for the cinema business in the United Kingdom, but it anticipated that 2007 would be a better year. As the industry is now dominated by three main operators (Odeon, Cineworld and Vue), the emphasis is shifting from consolidation to physical expansion. This is the same for their two smaller rivals, The Showcase owned by National Amusements and the Ward Anderson group of companies which own Empire. Multiplex cinemas now dominate the market with over 70% of available screens in 2006.

2.18 Cinemagoing 14 forecast that total admissions would increase by about 10% between 2005 and 2009, an average growth rate of 2.5% per annum. Forecasts anticipated a net addition of 110 screens in 2006, 120 in 2007, 60 in 2008 and 60 in 2009. Compared to the last decade these figures represent a considerable slowing of growth, 2% compared to past growth of 5.5%.

2.19 Further to this, Cinemagoing 16 forecast that by 2011 more than 300 screens will be added to the 3,440 operating in 2006. According to predictions in Cinemagoing 16, British cinema-goers will pay nearly £1.1 billion for cinema tickets in 2011; this is due to a strong upcoming film product, benefits from digital projection and a turn in the investment cycle to new cinemas.

Bingo

2.20 The bingo market peaked in the mid-1970s, with almost 2,000 clubs nationwide. Since then the sector has struggled to compete with other leisure activities, including the impact of the National Lottery. However, the decline has bottomed out and attendance figures have remained steady since the late 1990s, and revenues and profits have started to increase.

2.21 The UK had 700 commercial bingo clubs in April 2005, approximately one club per 80,000 people, plus around 100 holiday venues with licences to play bingo seasonally. Bingo clubs attracted 79 million admissions in 2005 (source: Mintel), about 1.75 admissions per adult per annum. On average each club attracted 113,000 admissions in 2005 (about 2,175 admissions per week). The average participation rate (adults) was 6.9% in 2004 (source: Mintel), split 2.8% regular players and 4.1% occasional players. The participation rate of the population who play bingo regularly in Wales is above the national average at 3.1%, compared with 2.8% national average. Mintel forecasts that admissions will decline from 79 million in 2005 to 68 million in 2010, although the average spend per head will increase from £26.90 to £38.40.

2.22 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups.

Nightclubs

2.23 The value of the nightclub market (permanent venue offering dancing in return for an admission fee) declined from £2.16 billion in 1998 to £1.77 billion in 2002 (source: Mintel - Nightclubs). There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 people.

2.24 The sector has faced increasing competition from late night pubs and bars, with no admission fees. BISL envisages a continued period of rationalisation and price competition. However, the forecast trend of significant growth in the 18-24 year old age group is expected to provide a growing market.

2.25 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people.

Private health and fitness clubs

2.26 Whilst the UK health club market expanded rapidly between 2000 and 2004, this was followed by a period of intense competition and widespread discounting. Operators' fixed costs have risen considerably, primarily because of a rise in energy costs. However, Mintel's latest report into Health and Fitness Clubs (May 2007) reports signs of a recovery in sales growth for operators, with the value of the market reaching almost £2.3 billion in 2006.

2.27 Business in Sport and Leisure (BISL) 2008 indicates healthy growth across the industry with the Fitness Industry Report stating that by the end of March 2007, there were 5,714 combined public and private sector fitness sites across the UK, 3,117 private clubs and 2,597 gyms within public sports centres. Since 2006, 232 new facilities had opened. The total number of UK health and fitness members at public gyms and private health clubs is now over 7 million.

2.28 Nearly 12% of the population are now members of a private health club or registered users of a leisure centre gym in the UK, compared with just 8.9% in 2002 and this growth looks set to continue. An estimated 7.3% of the population being members of private clubs at March 2007 up from 7.2% since January 2006. However, the UK is still below the USA where the fitness membership rate is 15.6%.

2.29 Private health clubs in the UK range from small independent clubs to large operators such as Cannons, David Lloyd, Esporta, Fitness First, Virgin Active, Bannatyne and LA Fitness.

2.30 Private health clubs had 4.2 million members in 2007 (1,375 members per club). The largest health clubs can have memberships of approximately 4,000 people. However, independent clubs remain a strong presence in the private sector market running 55% of all private clubs. Of the 126 new private health clubs that have opened since January 2006, 58% were independent clubs and 42% were owned by multiple operators. Public sector sports centres are also important, and the market increased significantly between January 2006 and March 2007, with 106 new facilities opened and in terms of like-for-like membership growth rates, the sector saw an impressive 4.6% growth.

2.31 Fitness First is the largest operator in the market, with 183 clubs and 452,000 members in 2007. The company has consolidated its position through both organic development and acquisition, including London-based Fitness Exchange chain. Whitbread Plc, which operates under the brand name David Lloyd, is in second place, with 59 clubs and 325,000 members. Virgin Active has emerged in third place having acquired its larger rival Holmes Place, whilst LA Fitness has risen to fourth place following its purchase of Dragons. These are followed by Esporta and Bannatyne, which has also grown following the acquisition of the LivingWell Premier clubs.

Leisure Centres and Swimming Pools

2.32 According to Mintel (Leisure Centres and Swimming Pools, Leisure Intelligence, May 2006), nearly a third of adults in the UK use a leisure centre at least once a month and one in five consumers visits a public leisure centre at least once a week. Admissions to leisure centres grew by 11% between 2001 and 2005.

2.33 At April 2006, there were 4,215 leisure centres in the UK, an increase of 16% since 2001. This rise is mainly due to National Lottery funding and the development of public private partnerships and PFI schemes. The strongest growth has been in sports centres with no pools, which have grown by almost a fifth between 2001 and 2006, reflecting the desire of local authorities to diversify away from the pool as the hub of the centre.

2.34 Despite continuing uncertainty for operators surrounding the price of energy supplies, Mintel suggests that ever increasing numbers of consumers will be using leisure centres and swimming pools over the period 2006 to 2011. Motivations for getting exercise are likely to continue to get stronger and initiatives such as those funded by the Lottery and linked to the London 2012 Olympics should also encourage greater involvement.

Catering, pubs and bars

2.35 On average households in the UK spent over £1,000 per annum eating and drinking away from the home in 2004-05 (source: Family Expenditure Survey).

2.36 Food and drink establishments (Class A3) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks. Within town centres the demand for A3 uses has increased including a significant expansion in the number of coffees shops, such as Starbucks, Costa Coffee and Coffee Republic.

2.37 National branded pub/restaurant chains have been investing heavily, although not exclusively in larger centres. Many chains such as All Bar One, JD Wetherspoons and Yates Wine Bars have sought representation in smaller centres close to residential communities.

2.38 National information available from Goad Plans indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 2.1. The proportion of Class A1 retail uses in Goad town centres decreased 9% from 1991 to 2007 whilst A3 uses (excluding pubs) increased 6%.

Figure 2.1: GB Goad Plan Town Centres Use Class Mix

Type of Unit	Proportion of Total Number of Units (%)			
	1991	**1994**	**2000**	**2007**
Class A1 (Retail)	62.7	61.2	59.1	54.2
Class A1 (Services)	6.6	6.9	8.2	9.9
Class A2	8.2	8.5	8.9	9.8
Class A3*	8.6	9.2	11.2	14.4
Miscellaneous	0.8	1.0	1.4	1.3
Vacant & Under Const.	13.1	13.2	11.2	11
Total	100.0	100.0	100.0	100.0

Source: Goad Centre Reports **excludes Bars/Public houses*

2.39 This national Goad data provides an average for over 1,100 town centres across the country, and relates to a wide range of centres in terms of size and type. In general, larger city and town centres will have a higher proportion of retail units than smaller town and district centres, which have a mix of shops and services.

2.40 Themed bar operators and pub restaurants have grown significantly over the last ten years, such as JD Wetherspoons. These outlets generally require a minimum 50,000 population and are usually located on main streets or secondary positions close to prime retail, commercial and other leisure users. Operators usually require large premises of 250 - 1,500 sq m, in close proximity to public car parks and good transport links.

2.41 Themed restaurants have also expanded rapidly in recent years. These operators have located in out of centre retail/leisure parks as well as good secondary/primary high street locations. Fast food operators such as McDonalds and Burger King have expanded the number of drive through outlets, and town centre outlets. Outlets have been developed within retail/leisure parks or on busy roads. Outlets require sites of approximately 0.2 hectares.

2.42 The growth in Class A3 uses within town centres may continue in the future, and will compete for shop premises with other town centre uses.

Ten-pin bowling

2.43 Whilst tenpin bowling grew rapidly in the UK in the 1960s, the complex scoring system, lack of investment and the deterioration exacerbated a significant decline in the 1970s. However, a resurgence of interest in tenpin bowling during the late 1980s and computer scoring led to a second boom. According to Mintel (Tenpin Bowling (UK) Report, July 2006), there were 322 tenpin bowling centres in the UK in 2006, up from 285 in 2004.

2.44 The tenpin bowling sector experienced steady growth in the late 1990s, followed by a 17% increase in value between 2001 and 2006, taking consumer spending at centres to £273m a year. The industry is predicted to experience a gradual increase in future years, with growth likely to be focussed in the 20-24 and over-45 age ranges.

2.45 Bowling centres now tend to be part of major leisure developments that include multiplex cinemas, restaurants and nightclubs offering a choice of leisure and entertainment activities. The leading tenpin bowling operator is AMF Bowling, which had 33 centres offering 753 lanes in May 2006. Other major operators include Hollywood Bowl (25 sites, 630 lanes), Megabowl (24 sites, 617 lanes), Tenpin (15 sites, 414 lanes) and Bowlplex (16 sites, 372 lanes).

Socio Economic Context in Rhondda Cynon Taf

2.46 Having identified national trends, we have also briefly reviewed the socio-economic characteristics of the Borough and how this might impact upon indoor leisure usage within the Borough.

Population and Age

2.47 The 2001 census indicates there are a total of 231,946 people living in Rhondda Cynon Taf. During the period between 1991 and 2001 the population of Rhondda Cynon Taf remained largely unchanged.

2.48 The Welsh Assembly government forecasts the number of households in the area is to increase by 16.2% between 2003 and 2023.

2.49 As shown in figure 2.2, the distribution of age groups within Rhondda Cynon Taf is consistent with both the Welsh and English averages. The age group with the largest number of individuals is 30-39, and the average (mean) age within the Borough is 38.

Figure 2.2: Age structure (2001 Census)

	RCT	**Wales**	**England**
Aged 0 -9	12.45%	12.17%	12.31%
Aged 10 -19	13.57%	13.11%	12.74%
Aged 20 -29	12.33%	11.57%	12.66%
Aged 30 - 39	14.52%	14.14%	15.60%
Aged 40 - 49	12.82%	13.09%	13.38%
Aged 50 - 59	13.00%	13.27%	12.55%
Aged 60 - 69	9.61%	10.04%	9.25%
Aged above 70	11.69%	12.62%	11.51%

Social grade, economic activity and employment

2.50 The number of administrative, professional and skilled manual workers is fairly consistent with national averages, as shown in figure 2.3. The percentage of semi-skilled and unskilled manual workers in RCT however is over 4% higher than the average for Wales, and 15% higher than the average for England.

Figure 2.3: Approximate social grade (2001 Census)

	RCT	Wales	England
Higher and intermediate managerial / administrative / professional (AB)	19.14%	19.48%	22.19%
Supervisory, clerical, junior managerial / administrative / professional (C1)	31.12%	34.24%	29.72%
Skilled manual workers (C2)	17.32%	18.01%	15.06%
Semi-skilled and unskilled manual workers (D)	32.28%	28.02%	17.03%
On state benefit, unemployed, lowest grade workers (E)	0.15%	0.25%	16.00%

2.51 The proportion of economically active adults in RCT is 3% lower than the national average and 15% lower than the average figure for England. The number of unemployed adults is consistent with both the Welsh and English national averages. However there are a significantly larger number of individuals who are permanently sick or disabled and therefore economically inactive. This could potentially affect the number of people who are able to partake in some leisure activities.

Figure 2.4: Economic activity (2001 Census)

	RCT	Wales	England
Economically active	**57.22%**	**60.98%**	**66.86%**
Part-time	9.91%	11.31%	11.81%
Full-time	36.64%	36.18%	40.81%
Self Employed	4.94%	7.69%	8.32%
Unemployed	3.57%	3.49%	3.35%
Full-time Students	2.15%	2.30%	2.58%
Economically inactive	**42.78%**	**39.02%**	**33.14%**
Retired	13.73%	14.81%	13.54%
Student	5.10%	5.12%	4.67%
Looking after home / family	6.59%	6.39%	6.52%
Permanently sick / disabled	12.96%	9.22%	5.30%
Other	4.40%	3.48%	3.10%

2.52 As figure 2.5 shows the number of individuals in managerial and professional occupations is lower than the Welsh average, which may have a bearing on the amount individuals are able to potentially spend on leisure activities.

Figure 2.5: Socio economic classification (2001 Census)

	RCT	Wales	England
Higher managerial and professional occupations	4.53%	5.91%	8.61%
Lower managerial and professional occupations	14.07%	16.05%	18.73%
Intermediate occupations	7.94%	8.01%	9.48%
Small employers and own account workers	4.86%	7.06%	6.98%
Lower supervisory and technical occupations	8.01%	7.80%	7.11%
Semi-routine occupations	12.41%	12.25%	11.65%
Routine occupations	12.17%	9.94%	9.02%
Never worked and long-term unemployed	4.41%	3.83%	3.73%
Not Classified	31.60%	29.15%	24.70%

2.53 The 2005 index of multiple deprivation indicates 19% of the 152 lower super output areas in Rhondda Cynon Taff are in the top 10% of most deprived areas in Wales.

Car Ownership

2.54 Almost 70% of people in RCT own a car or van, with over 20% owning two or more private vehicles. The number of individuals who own a private vehicle is approximately 6% and 5% lower than the Welsh and English national averages respectively. Therefore it may be necessary for emphasis to be placed upon public transport infrastructure within the Borough, to increase access to leisure facilities.

Figure 2.6: Car or van ownership (2001 Census)

	RCT	Wales	England
No car or van	31.59%	25.95%	26.84%
1 car or van	44.93%	45.54%	43.69%
2 cars or vans	19.31%	22.94%	23.56%
3 cars or vans	3.38%	4.31%	4.52%
4 or more cars or vans	0.79%	1.25%	1.39%

2.55 In summary, the population of Rhondda Cynon Taf is in general terms less economically active in comparison to the rest of Wales and England. There are a higher number of individuals who have been unemployed for long periods of time, and many areas throughout the Borough are economically deprived. The combination of these factors may potentially reduce the number of individuals who are able to partake in leisure activities.

3.0 POLICY REVIEW

3.1 Planning policy is an important part of the framework of assessing the need for indoor leisure floorspace.

3.2 This section sets out the various national, regional and local planning policy which guides leisure provision in Wales and subsequently the Borough. In addition to planning policy, there are a number of wider policy initiatives which are also relevant in setting the context for this study.

National Planning Policy: Leisure and Culture

- *Planning Policy Wales (PPW, March 2002)*

3.3 PPW sets out the Welsh Assembly Government's land use planning policies. Planning is recognised to have a fundamental role in delivering sustainable development by helping in the process of balancing and integrating the Assembly's sustainable objectives in order to meet current development needs while safeguarding those of the future. The planning system is required to provide for homes, infrastructure, investment and jobs in a way which is consistent with sustainability principles (as set out in PPW).

3.4 PPW (para 2.2) outlines nine sustainability principles which relate to a wide range of issues which are relevant to this study, these include:

- o *"putting people, and their quality of life now and in the future, at the centre of decision-making*
- o *taking a long term perspective to safeguard the interests of future generations, whilst at the same time meeting needs of people today"*

3.5 In accordance with these sustainability principles, PPW outlines a set of broad objectives which derive from these principles and reflect the wider sustainable development agenda. These principles seek to promote resource-efficient settlement patterns and locate development in accessible locations so as to minimise demand for travel, especially in terms of the private car. Good access to such elements is viewed to maximise opportunities for community development and cohesion, as well as social welfare.

3.6 Specifically in terms of leisure, local authorities are required to consider whether there is a need for additional leisure provision and in circumstances where need is demonstrated, authorities are obliged to adopt a sequential approach in selecting sites. In addition to this, the proposed leisure facility should be appropriate in scale to the centre in which it will be located. For example uses which need to be accessible to a large number of people, such as major leisure uses - theatres, multi-screen cinemas, bingo halls and bowling alleys are preferably to be located in town centres, whereas smaller scale facilities should preferably be located in district, local and village centres.

3.7 Furthermore PPW requires that local authorities provide the framework for well-located sport, recreation and leisure facilities which should be sensitive to the needs of users, attractive, well-designed, well-maintained, safe and accessible to all. PPW also refers to the need for the planning system to ensure that adequate land and water resources are allocated for formal and informal sport and recreation.

- *Adopted TAN (Wales) 4: Retailing and Town Centres (1996)*

3.8 National policy seeks to protect and enhance the vitality and viability of town centres. In accordance with this national aim, this TAN outlines a number of indicators which are identified as important in measuring the vitality, attractiveness and viability of town centres. Particular reference is made to maintaining a diversity of uses in the town centre; such uses include shopping, cultural and entertainment activities, hotels, restaurants and offices.

- *Adopted TAN (Wales)13: Tourism (October 2007)*

3.9 The Advice Note recognises that tourism cannot be regarded as a single or distinct land-use category; it comprises of a range of different, but interdependent activities and operations which overlap with sport, entertainment, the arts and other recreation and leisure activities. The issues it raises should be addressed in preparing or revising development plans and in development control decisions. Limited reference is made to the indoor leisure aspect of tourism.

- *Draft TAN (Wales) 13: Tourism (July 2006)*

3.10 Tourism has been defined by the Tourism Society as *'the temporary short term movement of people to destinations outside the places where they normally live and work and the activities during the stay at these destinations'.*

3.11 The draft TAN requires that the economic and employment benefits of tourism should be maximised through the encouragement of greater levels of tourist investment and expenditure. The Assembly Government recognises and supports the important contribution that tourism can make to urban and rural renaissance and for increasing the levels of diversity in the local economy.

- *Adopted TAN (Wales) 16: Sport and Recreation (March 1998)*

3.12 This TAN outlines the responsibilities of the Sports Council for Wales, the Countryside Council for Wales and the Environment Agency in relation to sport and recreation planning, and notes in particular the need for planning authorities to consider the relationship between the recreational use of land and the interests of conservation.

3.13 This note predominantly relates to outdoor sport provision and open space. Limited reference to made to indoor leisure uses.

- *Draft TAN (Wales) 16: Sport, Recreation and Open Space (July 2006)*

3.14 This TAN was prepared in the light of the Welsh Assembly Government's (WAG's) commitments to health and well being, increased participation in physical activity and opportunities for all, as set out in '*Wales: A Better Country'* (September 2003) and '*Climbing Higher'* (January 2005).

3.15 This TAN relates predominantly to outdoor open space although the document's principles - to increase the physical activity levels and locate facilities in accessible locations remain relevant to indoor leisure provision.

Regional Planning Policy: Leisure and Culture

- *Mid Glamorgan (Rhondda Cynon Taf County Borough Council) Replacement Structure Plan (1991-2006)*

3.16 The Structure Plan sets out County Borough wide strategic guidance for land-use development over a period of 15 years, until 2006. Although now out-of-date this adopted plan still forms an important part of the development plan policy framework for the former Mid Glamorgan area. It will be replaced by the LDP in due course.

3.17 In terms of leisure, the Plan's objective is to encourage development of new leisure facilities which are compatible with the conservation of the environment. In addition to this, the Plan seeks to encourage the wider public use of existing leisure facilities and the further development of tourism in the County Borough by supporting new attractions and destinations.

3.18 Policy L1 sets out the criteria by which development proposals for the provision of leisure-based facilities or accommodation will be permitted. Amongst other requirements, proposals should be well-related to surrounding urban settlements (where relevant), accessible by public transport (where appropriate for the nature of the proposal), and appropriate in location to the nature of the proposal.

3.19 Echoing national aims to locate development in suitable locations, Policy L2 states that leisure-based developments within settlement areas, or adjacent to them where no suitable alternatives are available within the built-up area will be favoured. Similarly, Policy L3 makes reference to the requirement to take account of need and sets out the Council's support for leisure development which satisfies demand for these facilities (Policy L3).

3.20 Policy L4 instils a level of protection against the discontinuation of an existing leisure facility due to new development, redevelopment or a change of use. Whilst Policy L5 supports the use of educational and other publicly owned establishments for wider community leisure purposes.

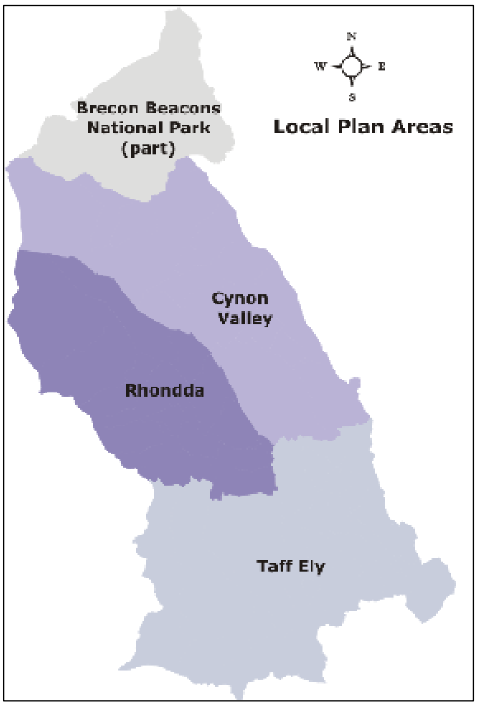
3.21 Leisure-based development proposals which support the further enhancement and development of the northern valley areas as major tourist areas will be favoured (Policy L7).

Local Planning Policy: Leisure and Culture

Rhondda Cynon Taf Local Plans

3.22 RCT comprises the three geographic areas of the Rhondda, Cynon and Taff Ely Valleys. Each area has its own Local Plan:

- Rhondda Cynon Taf (Rhondda) Local Plan 1991-2006
- Rhondda Cynon Taf (Cynon Valley) Local Plan 1991-2006
- Rhondda Cynon Taf (Taff Ely) Local Plan 1991-2006



(Source: Rhondda Cynon Taf website)

Adopted Rhondda Cynon Taf (Rhondda) Local Plan 1991-2006

3.23 This Local Plan was adopted in January 2003 and covers the period 1991 – 2006. The Plan sets out a series of thematic objectives, with objective OBJ17 seeking to remedy existing deficiencies in the availability of recreation facilities and to provide for future recreational needs (both formal and informal) in both the urban area and in the surrounding countryside.

3.24 Policy DCP16 deals with proposals for change of use of premises to restaurants, café or hot food takeaways. Whilst it is recognised that these elements are widely used by a large and growing proportion of the population such proposals often prove unpopular with occupiers of adjacent premises due to nuisance and inconvenience. This policy sets out a number of assessments which will seek to measure the effect on neighbouring properties, the effect on the highway network and the effect on the proposal on the vitality and viability of that retail zone.

3.25 Specifically in relation to tourism and leisure, the Council recognises in the Rhondda Local Plan (paragraph 9.1.2) the potential of tourism and leisure development as a means to diversify the local economy and provide new employment opportunities.

3.26 Policies such as TL3, TL1 and TL4 set out Council plans for the development of the Park and Dare Theatre (a programme of development has been completed), extension of the Rhondda Sports Centre (currently underway) and Rhondda Heritage Park (now complete).

Adopted Rhondda Cynon Taf (Cynon Valley) Local Plan 1991-2006

3.27 This Local Plan was adopted in January 2003 and covers the period between 1991 and 2006. The Strategy for the Cynon Valley Local Plan is:

> *"To secure the economic regeneration of the Cynon Valley by providing opportunities for new investment through the allocation of land and the control of new development, without prejudice to the conservation and enhancement of the built and natural environment"*.

3.28 Chapter 8 of the plan deals with urban regeneration. Policy objectives seek to support initiatives aimed at improving the appearance and quality of the physical environment in order to promote future inward investment. This is preferably done through partnership between the public, private and voluntary sectors. Interlinked with this the plan aims to improve the image and profile of the area in terms of major private sector investment and secure the restoration of land and buildings in providing future development opportunities.

3.29 Policy URB2 seeks to revitalise the area's town centres through renewal initiatives, traffic management measures and streetscape enhancement.

3.30 Chapter 9 relates to recreation, leisure and tourism. The Council, in the Cynon Valley Local Plan, recognise the need to meet the recreational needs of the Plan Area's population and visitors alike. The Sports Council for Wales' Planning Facilities Model indicated that 36.8% of the demand for sports halls was unsatisfied in the Plan Area.

3.31 Policy R2 seeks to permit development of existing recreation facilities for other uses only where it can be demonstrated that the facility is surplus to requirements. Policy RP8 identifies land at Robertstown for leisure facilities.

Adopted Rhondda Cynon Taf (Taff Ely) Local Plan 1991-2006

3.32 This Local Plan was adopted in June 2003 and covers the period between 1991 and 2006.

3.33 Taff Ely occupies a strategic location in industrial South Wales and is recognised to be in a strong position to attract inward investment due to its close proximity to the M4 motorway and Cardiff. Llantrisant is the main settlement and represents a major manufacturing base and a service centre for nearby growing residential areas.

3.34 The Local Plan sets out a planning vision for Taff Ely, these are threefold and focus on the following themes:

- Safeguarding and enhancing the environment,
- Urban renewal, and
- Sustainable development.

3.35 Chapter 7 deals with Recreation and Tourism and sets out a number of Local Plan objectives for these aspects. Of relevance to this study is encouragement for the provision and enhancement of public indoor and outdoor sports and recreation facilities related to identified community needs and up to the given standards. In relation to this, Policy R1 *Indoor Sports, Recreation and Community Facilities* sets out the criteria by which new, replacement, extended or enhanced facilities for indoor sports and community recreation will be permitted. Considerations relate to residential amenity, traffic generation, accessibility and environmental impact. In particular a new covered swimming pool/leisure facility to replace the open air baths at Ynysangharad Park in Pontypridd is identified as a possible aim for the future. Similarly Policy R11 states that proposals for entertainment or leisure use of Pontypridd Town Hall Theatre will be permitted.

- *Emerging Rhondda Cynon Taf Local Development Plan (2006-2021) Preferred Strategy*

3.36 This strategy sets out the guiding principles for future planning decisions with a spatial vision and spatial objectives for the area.

3.37 The overall aim for the RCT LDP is derived form the vision for RCT outlined in 'A Better Life': Our Community Plan (2004-2014). The LDP will seek to ensure that:

> *"RCT will be a community where everyone who lives, works in or visits the area will enjoy the benefits of a better quality of life, achieving their potential, whilst helping to develop and protect the area for future generations"*

3.38 This vision is subsequently translated into a series of social and environmental objectives, the most relevant of which seek to:

- o *"Promote integrated communities, with opportunities for living, working and socialising for all*
- o *Provide an environment that encourages a healthy and safe lifestyle and promotes well-being"*

3.39 The plan uses a different approach for development in the north and in the south of the County Borough. In the north, emphasis will be on building sustainable communities and halting the process of depopulation and decline (see Strategic Policy SP1: Locational Strategy). The policy emphasis in the South will be on sustainable growth that benefits RCT as a whole (see Strategic Policy SP2). Within these areas the strategy recognises the important role principal towns and key settlements play in providing services of both local and county importance.

3.40 The area's three principal towns are recognised as important hubs for activity by acting as gateways for new investment, innovation and sustainable development. Principal towns of Aberdare and Llantrisant are areas in which significant residential, employment and retail development will be accommodated. Whereas the emphasis in Pontypridd will be on consolidation and redevelopment due to the topographical constraints.

Figure 3.1: Identified principal towns and key settlements in the Rhondda Cynon Taf County Borough Council (Preferred Strategy)

Principal towns	Pontypridd	Southern Strategic Area
	Llantrisant (inc Talbot Green)	Southern Strategic Area
	Aberdare	Northern Strategic Area
Key settlements	Tonypandy	Northern Strategic Area
	Tonyrefail	Southern Strategic Area
	Llanharan	Southern Strategic Area
	Treorchy	Northern Strategic Area
	Mountain Ash	Northern Strategic Area
	Porth	Northern Strategic Area
	Ferndale	Northern Strategic Area
	Hirwaun	Northern Strategic Area

Porth Town Centre Regeneration Strategy (24th January 2003)

3.41 Following consultation this regeneration strategy was formulated to provide a focussed, project-based plan in order to improve and regenerate the town of Porth.

3.42 An important leisure-related project outlined in this strategy was the MP3 Café and Digital Learning Centre now known as the Porth Plaza (adjacent to the Pop Factory). This sought to demolish the Old Pioneer building to create MP3 Café, Learning Zone, and presentation theatre. Planning permission was granted on 4th October 2003 and the facility opened in 2008 although it is has not been fully implemented yet.

3.43 The facility is a town centre youth facility, with an emphasis on the creative industries. It combines leisure and cultural activities and provides music technology facilities, video editing, wi-fi and gaming. It also currently accommodates a small number of creative industry businesses on the top floor with potential for expansion.

Pontypridd Regeneration Strategy Final Report (July 2005)

3.44 This strategy is based upon the Council's vision to make Pontypridd the 'County Town' and economic hub and driving force for the whole of RCT. Part of this vision is to make the town memorable, an integral part of which seeks to encourage new retail and leisure developments in the heart of the town to enhance and reinvigorate the existing offer.

3.45 In particular Pontypridd in Partnership (PIP), as a partnership between the Council, Town Council, Glamorgan University and retailers seeks to develop Pontypridd as a true 'University town'. This will also assist in enhancing the Town as a major centre of cultural, recreational and entertainment activities.

3.46 The number of restaurants/bar facilities in the centre was identified to be lower than would normally be expected. Once more it was concluded that there was a very limited range of attractions or reasons for visitors to use the town centre during the evening or night except for drinking in public houses and/or visiting one of the few restaurants or takeaways which are open at night.

3.47 Further to this, an up-dated Regeneration Strategy for Pontypridd is currently being prepared by Consultants on behalf of the Council. This emerging Strategy will seek to investigate the potential of developing a Cultural Quarter in the town.

Tonyrefail Town Centre Regeneration Strategy Final Report (7 June 2006)

3.48 The document sets out a vision for Tonyrefail Town Centre, it seeks to create:

> *"A high quality town centre environment with services and facilities for the local community, easily accessible by all modes of transport as well as a safe and successful place to live, work and carry out business" (page 5-1)*

3.49 This vision was to be realised through ensuring the town is a strong shopping and service centre, creating a high quality, safe and accessible town centre environment and supporting the wellbeing of the town. An integral part of the latter action point is the extension and refurbishment of the Tonyrefail Leisure Centre which is currently underway.

Future Ferndale: A Regeneration Strategy for Ferndale Town Centre (November 2006)

3.50 This strategy sets out a number of regeneration proposals relating to transport, enhancements to gateways, Darran Park and the town centre as well as improvements in the commercial areas and parking facilities. The strategy made limited reference to leisure although concluded that the tourist appeal of Ferndale will always be special interest/niche and by implication the number of visitors will be small. Consequently the strategy sought to focus improvements upon community benefit and lifestyle enhancements for local people.

Wider National Policy Initiatives: Leisure and Culture

3.51 Besides planning policy, leisure and culture provision is influenced by the wider Welsh policy initiatives. An understanding of the ways in which leisure and culture issues fit into the broader policy context is important in ensuring that they can meet wider objectives relating for example to health and well-being, social inclusion and education.

- *People, Places, Futures: The Wales Spatial Plan (2008 Update)*

3.52 The Wales Spatial Plan (2008 Update) considers five key themes which are: building sustainable communities, promoting a sustainable economy, valuing the environment, achieving sustainable accessibility and respecting distinctiveness. It also identifies a number of spatial plan areas with Rhondda Cynon Taf falling within the 'South East Wales – Capital Network' area.

3.53 Within this area fourteen key settlements have been identified which includes Aberdare, Pontypridd and Llantrisant in RCT. The plan states that within these key settlements *"a wider range of facilities and services, which add to employment opportunities, should be delivered locally within the key settlements to reduce the overall need to travel"* (Page 128).

3.54 The WSP further recognises *"the area around Llantrisant and north west Cardiff which has seen major growth over the past 30 years"* (Page 130) as a 'Strategic Opportunity Area' (SOA) although it is stated that this should not confer any specific status to proposals and is *"rather a vehicle to promote good cross-boundary working"* (Page 130).

- *One Wales: A Progressive Agenda for the Government of Wales.*

3.55 This document forms an agreement between Wales' coalition parties - Labour and Plaid Cymru Group. It aims to deliver a progressive, stable and ambitious programme for government over this Assembly term.

3.56 Pursuing improvements in the nation's health forms an important theme of the agreement. Intertwined with this aim, specific objectives relating to sport and physical activity are prominent. For example, the agreement seeks to provide more resources for physical education in schools, promote the retention of school playing fields and develop opportunities for schools and colleges to work with local sports clubs and to invest in sports coaching.

3.57 The document indicates that seven out of ten people in Wales do not undertake enough physical activity to gain any health benefits. Consequently, it seeks to encourage greater participation by people of all ages and social backgrounds in grassroots sport.

- *Climbing Higher: The Welsh Assembly Government Strategy for Sport and Physical Activity (January 2005)*

3.58 This is the Welsh Assembly Government's long-term strategy for sport and physical activity. It sets out its strategic direction in Wales for the next twenty years and recognises the importance of sport and physical activity by seeking to place such themes at the heart of Welsh life and Government policy.

3.59 The document outlines a series of ambitious targets to achieve in the next 20 years, these include seeking to ensure that 40% of adults are members of sports clubs or centres (target 6) compared with 80% of children (target 7). Similarly, target 8 seeks to ensure that all public sector employees and three-quarters of all other employees will have access to sport and physical activity facilities, at or within a 10 minute walk of the workplace.

- *Climbing Higher Next Steps (July 2006)*

3.60 This document provides a progress report on the earlier Climbing Higher twenty year vision and intentions for the remaining years. Namely, since 1999 spend on sport and physical activity within the Welsh Assembly Government's cultural portfolio has increased by 250%. This has included the first national free swimming programme in Europe and an expansion of the activities of the Sports Council for Wales.

3.61 In the future, the Government intends to increase spending within sport policy by a further £7.8 million per annum. The ultimate Climbing Higher vision is for more adults participating on a daily basis as well as aspiring to achieve greater sporting success.

- *A Framework for the Delivery of Dragon Sport (2005) Sports Council for Wales*

3.62 Written by the Sports Council for Wales, this framework seeks to encourage everyone to increase their activity, in partnership with sports organisations, local and health authorities and people in the communities. In order to achieve this there are a number of themes which are utilised to guide intervention. These include:

  - Active Young People
  - Active Communities
  - Developing People
  - Developing Places
  - Developing Performance and Excellence

- *Welsh Assembly Government Play Policy (October 2002), Children and Young People: Rights to Action (November 2000) and Play Policy Implementation Plan (February 2006)*

3.63 'Children and Young People: Rights to Action' (November 2000) was written in light of the commitment made during the United Nations Convention on the Rights of the Child. The document sets out seven core aims for children and young people, one of which relates to Play, Leisure, Sporting and Cultural Activities. This aim, which seeks to increase the types of place where children can play while continuing to safeguard their safety, is of particular relevance to this study.

3.64 Following the publication of the earlier Action Plan in November 2000, the Welsh Assembly Government Play Policy was published in October 2002. This policy document sets out the Government's recognition of the importance of play and their commitment that society should seek every opportunity to support it.

3.65 The Play Policy Implementation Plan (February 2006) explains how the principles in the Play Policy document will be implemented. This Implementation Plan seeks to encourage more play provision, provide more guidance on what constitutes quality play opportunities and outlines a commitment to work with practitioners, communities and children to develop standards for a wide variety of play provision.

- *Turning Heads: A Strategy for the Heads of the Valleys 2020 (June 2006)*

3.66 This strategy builds on earlier strategies produced by the Heads of the Valleys Programme, namely *'Heads We Win'* (March 2005) and *'The Way Ahead…'Towards a Strategy for the Heads of the Valleys'* (February 2006).

3.67 The Heads of the Valleys Programme is a 15 year regeneration strategy developed in partnership with five local authorities, including RCT, and other local stakeholders. The aim of the programme is to tackle the root causes of economic inactivity and other key issues in the area within the context of the Wales Spatial Plan.

3.68 *'The Way Ahead …'Towards a Strategy for the Heads of the Valleys*' (February 2006) put forward the five key themes around which the programme might be built, these are:

- *"An attractive and well-used natural historic and built environment*
- *A vibrant economic landscape offering new opportunities*
- *A well educated, skilled and healthier population*
- *An appealing and coherent tourism and leisure experience*
- *Public confidence in a shared bright future"*

3.69 The area is recognised to benefit from some important opportunities, namely the up-grading of the A465, continued major public investment, strong communities and positive developments in the South East Wales labour market. As well as opportunities, there are a number of challenges which need to be addressed in the area, such issues include, a declining population, high levels of economic inactivity, local educational attainment and skills levels and an unfavourable image.

3.70 In light of this knowledge of the area, the document outlines 12 strategic goals and programmes with an action plan for 2006/ 2009. The plan seeks to undertake major environmental ('landscape-scale') projects in 2006/07, then a renewal of key town centres in 2007/08 and development of the tourism and leisure offer in 2008/09.

Wider Local Policy Initiatives: Leisure and Culture

- *Draft Leisure Services Business Plan (April 2008-2011)*

3.71 The Community Plan for Rhondda Cynon Taf *"A Better Life"* recognises the need for everyone to experience the health and lifestyle benefits that regular exercise can offer. This document highlights the importance of offering good quality opportunities to participate, which meets the needs of individuals and communities and supports the Welsh Assembly Government's Strategy for Sport and Active Recreation*, "Climbing Higher".*

3.72 Leisure Services is the most significant provider of leisure and recreation opportunities within the County Borough, offering the following services to the community.

- 13 leisure centres, of which 10 contain swimming pools;
- Support for 38 community centres, 14 seasonal paddling pools, 8 summer play schemes and 4 annual county sports events

3.73 The service has received significant capital investment over the past 2 years, and the challenge is to now demonstrate the money was well spent by increasing the number of customers using the facilities.

3.74 The following elements are identified in the plan as needing to change in order to deliver improvements to the leisure and recreation service provider

a) "Completion of a full review of facilities, which will inform future service provision, and contribute to the Council's efficiency agenda.

b) Implement changes identified by the staff rota review, aimed at meeting both the service's financial needs and improvements in service delivery.

c) Improve the promotion of the service, and in particular the marketing and selling of the MoreCard and More Corporate Scheme.

d) Improve partnership working across all aspects of the service, and in particular with the Local Health Board, Education (including schools), and Community Services.

e) Increase aquatic participation by 1% per annum through the delivery of the Aquatic Development Plan.

f) Produce a 3 year Rhondda Cynon Taf "Sport and Physical Activity Delivery Plan".

- *Community Leisure Strategy 2004-14 “An Active Life” (November 2004)*

3.75 The strategy focuses on:

- Increasing participation
- Targeting inequality and health issues
- Regenerating communities

3.76 RCT is recognised to have the second lowest participation rate in Wales, in 2000/01. Only 43% of adults participated in any activity in a four-week period, compared with 71% in the most active authority populations.

3.77 ”An Active Life” focuses on three goals that will enable the Council and its partner organisations to make a significant contribution to the achievement of the vision. These goals are:

- **Active Participation** – *increasing regular activity for a greater proportion of the population.*
- **Active Individuals** – *targeting intervention and support at those who would benefit most from sport and recreation;*
- **Active Communities** - *using participation in sport and active recreation as a means to regenerate communities;*

- *South Wales Regional Plan, Arts Council for Wales (Approved 23rd April 2007)*

3.78 The plan seeks to set out the Arts Council for Wales priorities for funding which are associated with the organisation’s Corporate Plan Priorities which include to support and nurture creative individuals and spaces through investing in individuals and facilities. In addition to this, Arts Council for Wales aims to encourage greater participation in the arts for practitioners, artists and audiences specifically through targeted transformational community arts programmes in areas of deprivation and by tackling the economic, social and physical barriers to accessing the arts. Promoting opportunities for young people to experience the arts is also a corporate priority.

3.79 The plan sets out a number of action points which address these corporate priorities. A number of these are relevant for the Borough. For example the plan seeks to maximise the impact of the Arts Outside Cardiff funding for venues by working with local authority partners and Creu Cymru to nurture the continued development of the Regional Performing Arts Centres.

3.80 In addition the document outlines a plan to prioritise Lottery applications that facilitate coordinated and collaborative production, presentation and touring of high quality performing arts activity across all scales of venue, ensuring a good geographical spread. In particular areas of deprivation or previous low take-up of Arts Council for Wales grants and family audience building will be given priority.

- *Draft Children and Young People's Plan for Rhondda Cynon Taf (2008-2011)*

3.81 The document was produced for and by members of Fframwaith, the children and Young People's Partnership, with help from local children, young people and families as well as the people who work with them.

3.82 The overarching vision of the Fframwaith Partnership is:

> *"that children and young people in RCT will be healthy, well educated, confident and creative individuals contributing to and living safely within their communities"*

3.83 In order to achieve this vision the plan recognises that particular attention is required for three areas:

- Better access to services for children, young people and families
- More integrated delivery of services
- Better matching of services to local and individual needs

3.84 The plan aims to describe how agencies and services for children and young people across RCT will work together to achieve the WAG's 7 core aims and to meet the needs of children and young people living in RCT communities. Of particular relevance to this report is WAG's core aim *"to have access to play leisure, sporting and cultural activities".*

3.85 Chapter seven of the report deals with WAG's core aim in relation to play, sport, leisure and culture. The key aspect of this chapter's vision for the County Borough is to ensure that all children and young people have access to, and opportunity to participate in play, leisure, sporting and cultural activities. It is recognised that participation in the arts and an appreciation of the arts and culture, all add to an individual's understanding of the world and their place in it, and are an essential element of personal growth and well being.

3.86 The Borough is currently implementing a number of responses to tackle this core aim. These include the E3+ programme – a new school-based programme aiming to provide children and young people with easy access to sport, leisure and participatory art opportunities, '5 x 60' initiative – aiming to tackle the drop off in participation in sport and physical activity after primary school and development of Porth Plaza – a town centre-based creative industries hub for young people. However there are a number of recognised problems with this current approach. Namely the plan states that play and leisure provision has built-up over the years in a relatively ad-hoc fashion, meaning there are still gaps in provision for children and young people. In addition, inaccessibility of out-of-school opportunities in the County Borough because of the cost and in particular the availability and cost of transport is also a problem. As a result four priority outcomes have been identified:

1. *"Better access for those experiencing poverty, disadvantage or other geographical, physical or social barriers to participation*

2. *A broader range of participatory range of participatory activities that meet the demand and needs of children and young people*

3. *A wider and greater awareness of the value, importance and benefits of play, leisure, sport and culture in children and young people's lives*

4. *Good training pathways for those working with children and young people, to ensure opportunities to develop skills and knowledge to promote play, leisure, sport and culture"*

Policy Conclusions

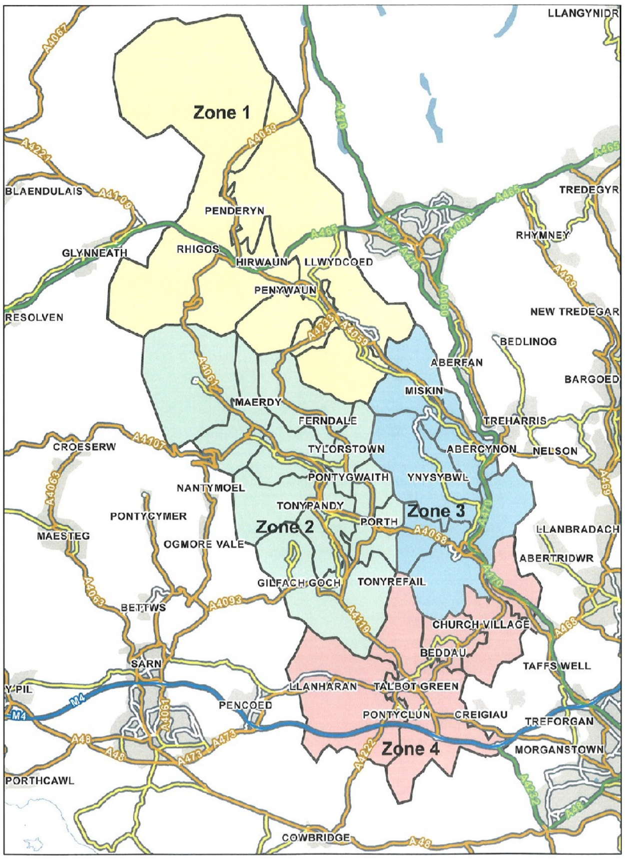
3.87 It is evident that there is strong policy support, both in planning and through wider policy initiatives, for the retention and enhancement of indoor leisure provision in order to improve quality of life as well as health and well-being, diversifying town centres and providing new economic opportunities in the Borough.

4.0 HOUSEHOLDER SURVEY RESULTS SUMMARY

4.1 As part of the evidence gathering for this assessment a telephone survey of 500 households was undertaken concerning indoor leisure usage in the Borough. The findings of the survey are contained in a separate Household Leisure Patterns Report, 2008, prepared by NLP, but summarised in this section.

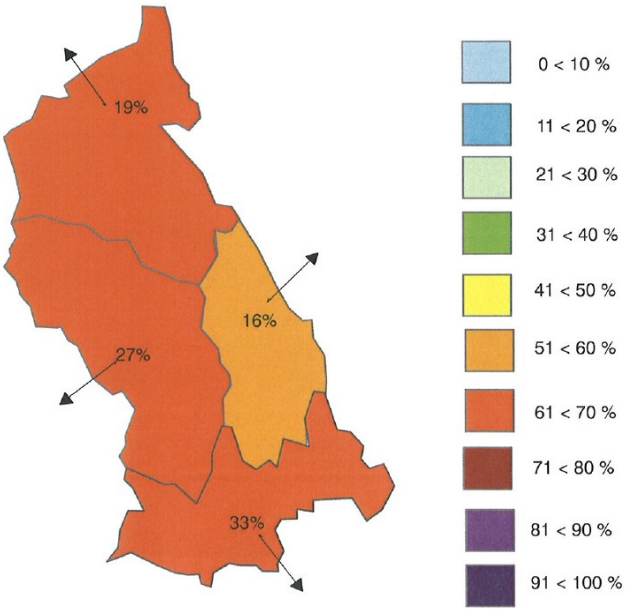
4.2 The study area broadly corresponds with the unitary authority boundary and has been divided into four zones. Zone 1 is located in the north of the Borough and contains the main settlements of Aberdare and Hirwaun. Zone 2 is located to the West of the Borough and incorporates the settlements of Ferndale, Treorchy, Treherbert, Tonypandy and Clydach Vale. Zone 3 is located to the east of the Borough and borders parts of Merthyr Tydfil and Caerphilly. The main settlements in this zone are Pontypridd, Abercynon and Mountain Ash. Finally, Zone 4 covers the southern most part of the Borough which includes the settlements of Llantrisant, Pontyclun, Llanharan and Talbot Green.

Study Area Plan



4.3 The following summary plans identify the level of participation within each of the four zones (by colour) and the levels of outflow (by arrow) where the leisure activity is undertaken outside of the Borough.

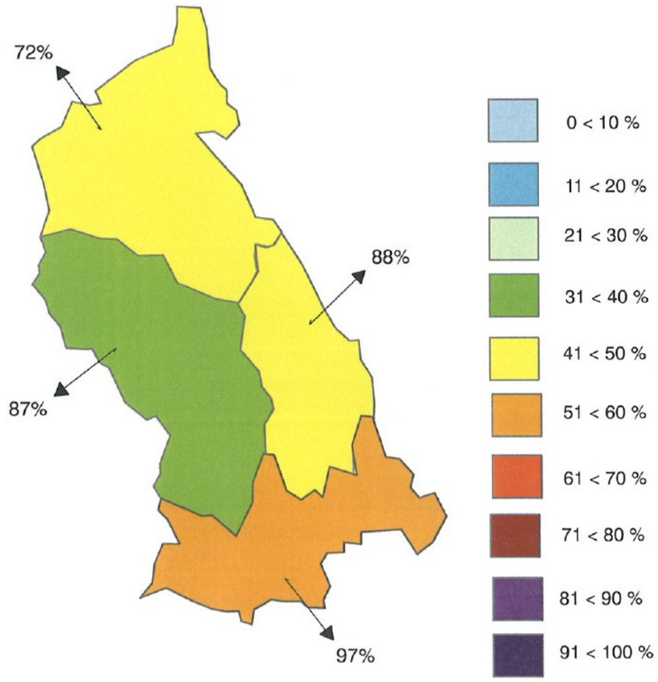
Cinemas



4.4 Cinema usage within the study area was high and the retention of these visits within the Borough was also considered to be strong. It appears to be the most popular indoor leisure activity in the Borough along with swimming. Zone 3 had the lowest visitation rate within the study area although only 5% of Zone 3 respondents would like to see a new cinema within their local area. However, 13% of Zone 1 respondents would like to see a cinema within their local area, potentially reflecting the fact that residents in the north of the Borough have to travel the furthest to reach a multiplex cinema.

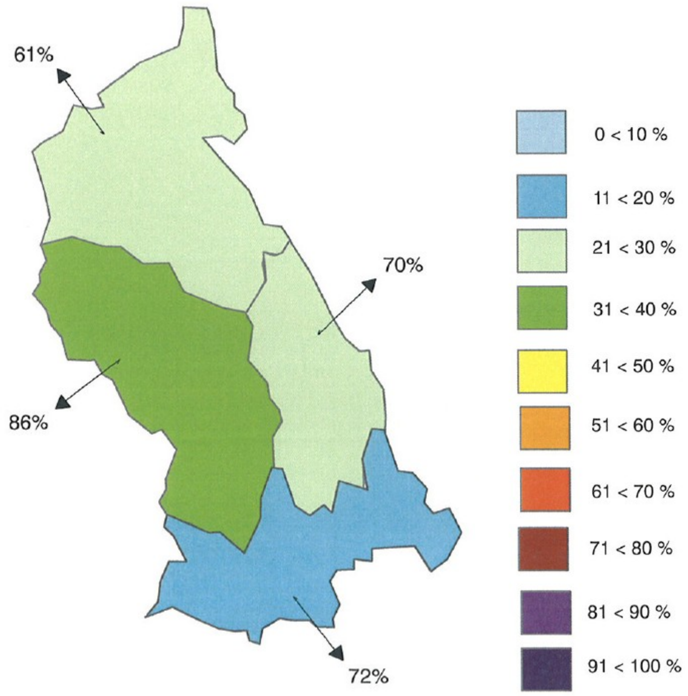
4.5 However, as stated in the corresponding HLP Report, a new cinema has opened in Merthyr Tydfil since the survey was undertaken which will better serve the residents of Zones 1 and 3.

Theatres



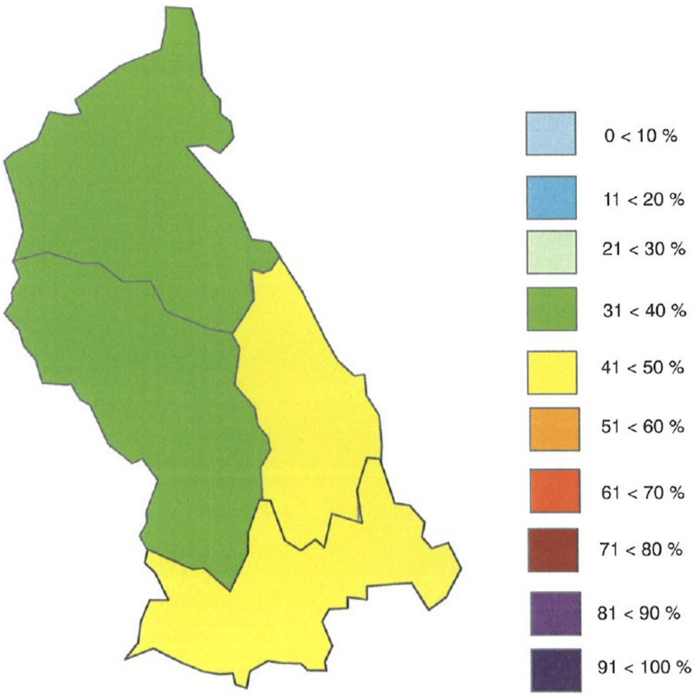
4.6 Theatre visitation within the Borough currently stands at less than 50% of which the majority of visits occur outside the Borough at venues within Cardiff and London. Only 5 respondents (1%) in the study area as a whole stated that they would like to see additional theatre facilities within the Borough. Therefore it would appear that there is no significant demand for further facilities at the present time.

Nightclubs



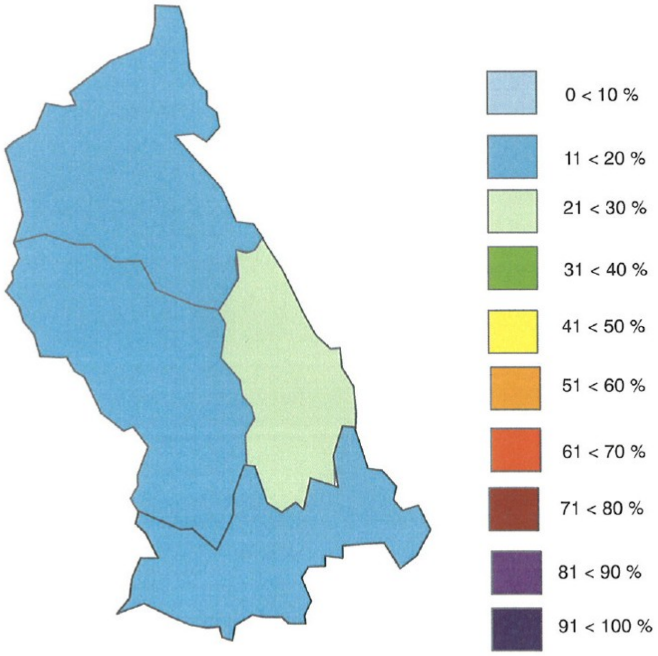
4.7 Nightclub usage amongst the respondents was relatively strong at 26% given that it is age restrictive to a certain extent. Those using nightclubs tended to visit Cardiff and Pontypridd. Only 0.6% of respondents within the study area stated that they would like to see additional nightclub facilities within the local area and therefore it is considered that demand does not currently exist to support additional facilities at the present time.

Live Music Venues



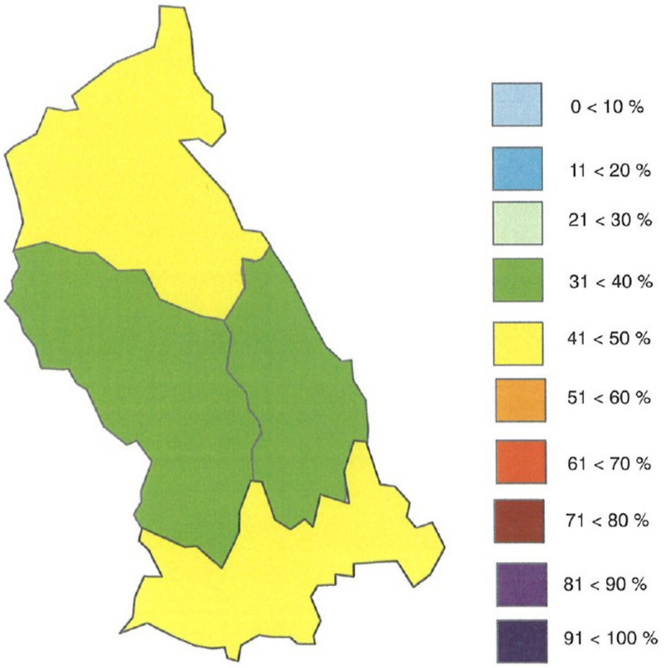
4.8 A relatively large proportion of respondents visit live music venues although the majority of these venues are very large facilities such as the CIA and the Millennium Stadium within Cardiff. No respondents stated that they would like additional live music venues within the Borough and it is considered that due to the local competition in Cardiff, Swansea and Bridgend it would be difficult to provide a competitive and viable live music venue within the Borough.

Bingo



4.9 Bingo usage was strong within the study area at 15% of respondents participating. There was no specific favoured venue, with people tending to use their nearest facility which meant the majority of visits stayed within the boundaries of the Borough. No respondents stated that they would like to see additional bingo facilities within the Borough and therefore, coupled with an already high participation rate, it is considered that demand is limited at the present time.

Heath & Fitness Clubs

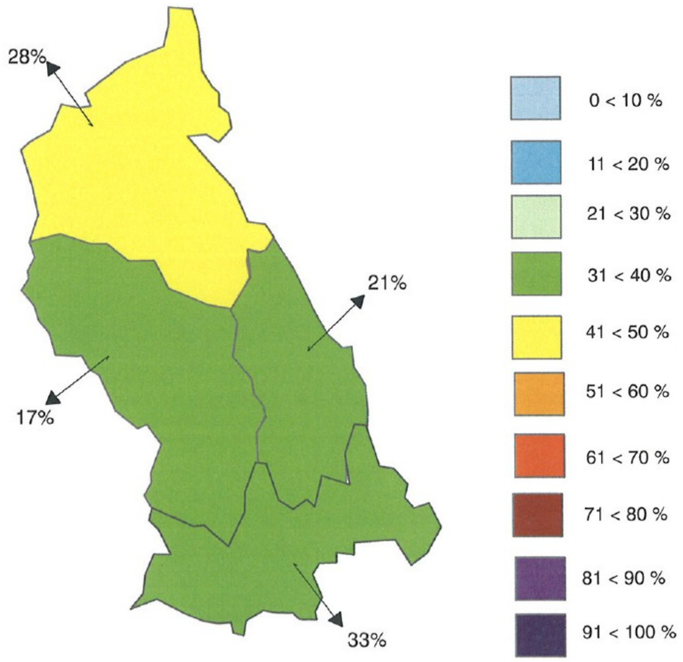


4.10 There was a relatively high usage of health and fitness clubs within the Borough with the majority of respondents opting to use Council run facilities within their immediate local area. However, based on the popularity of the JJB facility within Merthyr for Zone 1 respondents, it is considered that this could be a reflection of the lack of private clubs within the Borough.

4.11 For the study area as a whole, 10% of respondents would like to see additional health and fitness facilities within the local area with the highest demand coming from Zone 3 (21%) and Zone 2 (9%).

4.12 The respondents generally rated the existing Council run facilities as predominantly good.

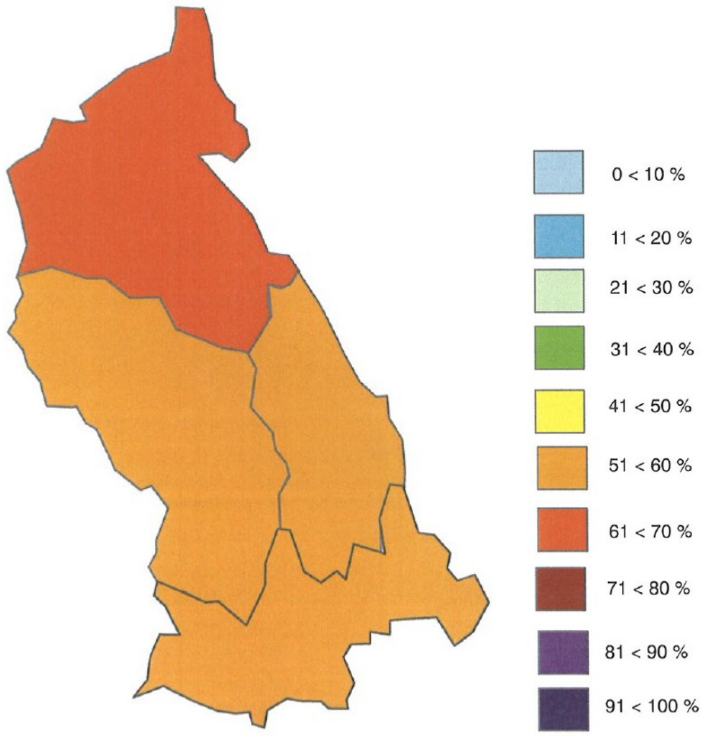
Tenpin Bowling



4.13 Tenpin bowling usage within the Borough was reasonable at 38% with the majority using the Borough's existing bowling facilities in Nantgarw and Rhondda. Despite being located in a different zone, the highest visitation to these facilities came from Zone 1, whose respondents (10%) also indicated a desire for additional facilities to be provided within the local area.

4.14 Since the survey took place a 16 lane tenpin bowling centre has opened in Rhydycar, Merthyr Tydfil. Therefore, this new facility will largely serve those residents within Zones 1 and 3.

Swimming Pools



4.15 Swimming pool usage within the study area was relatively high at 56% with the most visits occurring in Zone 1 and the least in Zone 3. The majority of people tended to use Council run facilities within their immediate local area. From the survey, there was a great desire for additional facilities within Zone 3 (40%) (which tallies with the existing low usage) and Zone 4 (17%).

Dance Studios

4.16 Dance studio usage was generally low within the Borough at only 8%. Those who use the facilities tend to use the amenities within the local area. From the survey results 2% of respondents stated that they would like additional dance facilities within the Borough with the majority coming from Zone 4. Therefore, it is not considered that there is a great demand for new dance facilities within the area.

Community Centres

4.17 Within the study area 39% of respondents use their local community centre although 32% of the local population did not know where their nearest centre was. It is considered that currently these centres are underutilised by the resident population.

4.18 Residents did not have strong views on potential improvements to community centres, although there was a very positive response to the suggestion that community centres should be better utilised for a wider range of leisure uses. The most common usage of existing community centres was for physical recreation.

Youth Clubs

4.19 Apart from a swimming pool, the most desired leisure facility within all four of the zones was a youth club or similar facility for the younger population. It is therefore considered that this is a need which is not being met despite a high demand. Such a use could be accommodated within existing community centres in some areas.

5.0 NEED FOR NEW LEISURE PROVISION

5.1 The need and capacity for new indoor leisure facilities can be expressed in qualitative terms, and, for a number of facilities, in quantitative terms.

5.2 Qualitative need reflects the size, specification and modernity of the facility and how that measures against current market trends and customer expectations.

5.3 Quantitative need considers the capacity of the facility to serve the population of the Borough based on a consideration of national participation rates and existing market shares.

5.4 Considerations of the spatial distribution of facilities is also relevant in considering both qualitative and quantitative need, and Appendix B therefore contains a series of drive time catchment plans of leisure facilities in and around the Borough.

Cinema

Existing Provision

5.5 The Borough currently has 6 cinemas; most of which (5 out of 6) are also theatres or concert halls (see Appendix A). In some cases the cinema function is subsidiary to a main performing arts use however in other cases the situation is reversed. In total these 6 cinemas provide 17 cinema screens and 4,783 seats. 5 of the 6 cinemas are small-scale facilities and accommodate just one cinema screen, these include premises such as the Parc and Dare Theatre, the Coliseum Aberdare, the Cwmaman Institute, the Phoenix Community Centre and the Muni Arts Centre in Pontypridd, which show a reasonable variety of old, alternative/foreign and new release films. The Showcase cinema at Park Nantgarw comprises the only modern, multiplex cinema in the Borough. It provides 12 cinema screens and accounts for over half of the total number of seats in RTC.

5.6 In addition to these 6 there are a further 8 cinemas located within the surrounding area, all but two of which are multiplexes. Figure 5.3 below shows the market share for each of the cinemas within the Borough.

5.7 The majority of the Borough's cinemas (5 out of 6) are located within older, often converted and non-purpose built buildings. However, the Coliseum in Aberdare, although an older building is a purpose-built cinema and theatre, built in 1937. The exterior of the building appears to be in need of some maintenance however the facility provides a spacious foyer area complete with a range of refreshments and excellent programme of events. Whereas the Showcase cinema represents a modern, purpose-built, multiplex equivalent. This facility is located within a wider Leisure Park. It has a large foyer selling tickets and refreshments, and is supported by free car parking directly outside the cinema.

5.8 The remaining 4 cinemas in the Borough comprise of older converted premises. This includes, the Parc and Dare Theatre in Treorchy which dates from 1913 and was originally funded by workers of the Parc and the Dare Collieries. The Muni Arts Centre in the centre of Pontypridd is a converted church and the Phoenix Community Cinema and Theatre in Ton Pentre and the Cwmaman Institute in Cwmaman appear to be conversions also.

5.9 All 4 converted cinema facilities vary considerably in quality.

5.10 The Muni Arts Centre in Pontypridd is considered to be of a good quality. It provides a good range of refreshments through an on-site café, good quality décor and relatively spacious and modern seats. A pay and display car park is available to its rear which is free in the night. The car park is not exclusive to the Muni Arts Centre and is available to all.

5.11 The Cwmaman Institute also comprises a relatively good quality facility whilst the Park and the Dare Theatre appeared to be in need of some maintenance (external and internal) although at the time of site visit, this facility looked to be well utilised. A free car park is located a short distance from the facility, adjacent to the neighbouring library. However this car park was almost full at the time of the site visit, this raises concerns over car parking capacity, particularly in the day-time and on weekends.

5.12 The Phoenix Community Cinema appeared rather dated in exterior and interior appearance. The facility provided a limited range of refreshment, and poor quality of seating and screen size.

Figure 5.1: The Coliseum Theatre, Aberdare

Figure 5.2: Interior of Phoenix Community Cinema & Theatre (330 seat capacity)

5.13 Clearly the quality of these smaller-scale facilities varies considerable, as such it is problematic to conclude that *all* smaller-scale, non-purpose built premises present deficiencies in cinema provision. Rather the Phoenix Community Cinema and Theatre appeared to represent the only clearly apparent deficient facility. Nevertheless it was apparent that each of these facilities although small-scale and in need of some maintenance (external or internal), represents an important means by which locally significant buildings which have a historical meaning for the local communities could be re-used. Interlinked with these aspects, it is clear that these facilities serve an alternative and niche customer group, which perhaps includes members of the older generation or those which are interested in independent or foreign language films which are not shown in the larger multiplex facilities.

Current Usage

5.14 The household survey results indicate that 64% of respondents in the study area visit cinemas with 36% never visiting these facilities. The retention rate of cinema trips within RCT ranges from 62% to 81%.

5.15 Figure 5.3 below shows that approximately 71% of the market share is retained within the Borough with approximately 26% of trade being absorbed by cinemas located outside of the boundary (however it should be noted that the new Vue multiplex cinema at Merthyr Tydfil was not open at the time of the survey).

Figure 5.3: Cinema Market Share

	% Market Share of Trips				
	Total All Study Area	Zone 1	Zone 2	Zone 3	Zone 4
Within RCT					
Showcase, Nantgarw	63%	55%	58%	81%	61%
Parc & Dare, Treorchy	3%	0%	8%	0%	0%
The Coliseum, Aberdare	2%	10%	1%	0%	0%
Other	3%	5%	5%	0%	1%
Within Total	***71%***	***70%***	***72%***	***81%***	***62%***
Ouside RCT					
Odean, Bridgend	11%	0%	18%	2%	14%
Cineworld, Cardiff	6%	7%	4%	8%	7%
Odean, Cardiff Bay	3%	5%	3%	2%	5%
UCI, Swansea	1%	7%	0%	0%	0%
Other	5%	7%	2%	5%	7%
Outside Total	***26%***	***26%***	***27%***	***17%***	***33%***

5.16 The Showcase cinema in Nantgarw attracts the most trips over the study area as a whole (62% overall) and also the highest number within each of the individual zones. The second most popular destination was the Odeon in Bridgend which attracted 11% of visits although these were primarily from Zones 2 and 4.

5.17 Zone 1 respondents visited the widest range of venues with residents visiting Cineworld in Cardiff, Odeon in Cardiff Bay, Coliseum Theatre in Aberdare and UCI cinema in Swansea (all achieving between 5 - 10% of visits).

5.18 The only other cinemas to receive a significant number of visits (5% +) by zone were the Parc and Dare cinema in Treorchy which attracted 8% of Zone 2 respondents and Cineworld in Cardiff which attracted respondents from Zone 3 (8%) and Zone 4 (7%).

5.19 Overall, the cinemas located within the Borough, with the exception of Showcase at Nantgarw, failed to attract a significant number of respondents with all achieving between 3% and 0.3% of visits over the study area as a whole. Furthermore, with the opening of a new multiplex cinema in Merthyr Tydfil the draw of these cinemas is likely to decrease further.

Future Need

5.20 To assess the demand for cinema admissions within the study area, Dodona's national forecasts for visits per person from 2001 to 2007 have been adopted. Growth in visits per person beyond 2007 have been assumed to grow at 2.6% per annum, based on a continuation of Dodona's annual growth rate between 2005 and 2007 up to 2008, 2012 and 2016.

5.21 The catchment population has been converted into a total number of cinema admissions per annum based on the national visitation rate (2.8 per person in 2003). Visitation rates have been projected based on a 2% growth rate per annum. The total number of cinema admissions has been converted into an optimum number of cinema seats, based on Dodona figures (300 visits per annum per seat). The results are shown in Figure 5.4 below.

Figure 5.4: Cinema Potential

Centre	2008	2011	2016	2021	2026
Catchment Population					
Rhondda Cynon Taf	234,327	237,008	242,376	248,370	256,860
Visits Per Annum	3.09	3.28	3.62	4.00	4.42
Total Visits Per Annum					
Rhondda Cynon Taf	724,405	777,539	877,910	993,254	1,134,119
Optimum Visits Per Screen	75,000	75,000	75,000	75,000	75,000
Optimum Visits Per Seat	300	300	300	300	300
Screen Potential					
Screen Potential (RCT)	9.7	10.4	11.7	13.2	15.1
Existing Screen Provision	17	17	17	17	17
Screen Surplus/Deficit	**-7.3**	**-6.6**	**-5.3**	**-3.8**	**-1.9**
Seat Potential					
Seat Potential (RCT)	2,415	2,592	2,926	3,311	3,780
Existing Seat Provision	4,783	4,783	4,783	4,783	4,783
Seat Surplus/Deficit	-2,368	-2,191	-1,857	-1,472	-1,003

5.22 The above table shows that there is no quantitative demand for additional cinema facilities within the Borough with a screen surplus of 7.3 and a seat surplus of 2,368 at 2008, however, it is considered that the multiplex at Nantgarw benefits from significant inflow from neighbouring parts of Cardiff and Caerphilly to absorb this surplus.

5.23 Using GIS software, we have been able to identify pockets of RCT's population which are located within a 'cinema desert' i.e. they fall out of a 10 minute drive time to single screen cinemas and out of a 20 minute drive time for multiplexes (Plan 2 Appendix B).

5.24 The number of people in the Borough falling into this category was 45,240 at 2008 rising to 46,606 at 2016 which is approximately 19% of the total population. Therefore based on the above visits per annum figure of 3.09 at 2008 this would total 139,792 visits rising to 144,023 at 2016 which is enough to support 1 – 2 screens or 466 – 480 additional seats.

5.25 However, only one of the existing facilities, The Showcase Cinema in Nantgarw, has more than one screen and this cinema is located very close to the southern border of the Borough. There is therefore a qualitative issue regarding modern multiplex cinemas within the Borough, which is further evidenced by the levels of outflow to multiplex cinemas in Bridgend and Cardiff and the likely outflow to the new multiplex Vue cinema in Merthyr.

5.26 In terms of addressing the qualitative deficiencies of the single screen cinemas, we have also identified that approximately 135,000 people in the Borough live beyond a 20 minute drive time of a modern multiplex cinema which amounts to around 57% of the population. This population would generate around 417,150 visits per annum at 2008 rising to 488,700 visits per annum at 2016 which is enough to support 6 screens by 2016 or 1,629 seats.

5.27 While it is considered that, on the basis of the above, there is no theoretical quantitative capacity for an additional cinema, given the 'cinema deserts' and potential qualitative need for a modern multiplex cinema we have considered three scenarios for locating a cinema in Llantrisant, Porth and Aberdare. The drive time catchment plans associated with these three scenarios are included at Appendix B (Plans 3 -5).

- Scenario 1 (Llantrisant): Within a 20 minute drive time of Llantrisant is a population of 243,145 which, based on a visitation rate of 3.09 would equate to 751,318 visits per annum which is 10 screens or 2,500 seats. Whilst Llantrisant has the catchment population to support a multiplex, as shown on Plan 3 (Appendix B) a new multiplex cinema is likely to overlap with the catchment area of existing facilities.

However, given Llantrisant's strategic location and designation as a Strategic Opportunity Area, providing an additional cinema facility within this location would prevent leakage to the multiplex's at both Bridgend and Cardiff thereby promoting more sustainable travel patterns within the Borough as a whole. It is therefore considered that there is a supportive argument for cinema provision within this area from a qualitative perspective.

- Scenario 2 (Porth): There is a population of approximately 145,015 within a 20 minute drive time of Porth which, based on the above figures, equates to approximately 448,096 visits, which is enough to support 6 screens or 1,500 seats. However, the estimated catchment area of a cinema in Porth would overlap with five of the existing cinemas including subsuming most of the 10 minute drive time catchments of 3 single screen cinemas in the Borough. This would limit the catchment potential at these existing facilities.

- Scenario 3 (Aberdare): Within a 20 minute drive time of Aberdare is a population of approximately 109,310 which based on the above figures equates to 337,768 visits or 4 – 5 screens or 1,125 seats. The estimated catchment of a proposed cinema in Aberdare (based on a drive time of 20 minutes) overlaps significantly with three of the existing cinemas (two outside the Borough) and would again impact upon the catchment potential of these existing cinemas and potentially result in the closure of existing cinemas in the area. There is however, only limited overlap with the catchment of the existing multiplex at Nantgarw.

Summary

5.28 Based on the above figures and the three scenario maps it is considered that there is limited quantitative need for an additional cinema within the Borough at the current time.

5.29 Whilst there is a qualitative deficiency of multiplex cinemas in much of the Borough, with more than half the population living more than 20 minutes from a multiplex cinema, any new multiplex located in the mid or north of the Borough would overlap or subsume the catchments of existing single screen cinemas in the Borough.

Furthermore, the new multiplex cinema at Merthyr Tydfil will largely serve the north of the Borough.

5.30 Due to the fact that there is limited quantitative need in the Borough, the introduction of a new multiplex cinema, could potentially increase the existing surplus of screens and seats in the Borough and could jeopardise the viability of the existing single screen provision in the Borough (although it is recognised that the cinema function of many such facilities is subsidiary to main uses associated with the performing arts). The single screen cinemas would need to concentrate on niche film markets in order to compete with a local modern multiplex cinema.

5.31 However, existing issues of unsustainable travel patterns to multiplex cinema's outside the Borough means that if such a development were proposed, the Council would need to consider the qualitative benefits of such provision over the potential loss of existing provision.

5.32 It is considered that any new cinema development should be directed towards the south of the Borough focussing around Llantrisant. This is due to the strategic location of this area and its ability to prevent residents from travelling greater distances to the multiplex's of Bridgend and Cardiff. Furthermore, locating a cinema in this area would amount to less competition for the single screen cinema's to the north of the Borough.

Theatres

5.33 There are 9 theatres in the Borough (see Appendix A). These range from small community and/or college theatres such as the Spectacle Theatre, Llwynypia and the Soar Centre, Pen-y-Graig, to much larger theatre venues such as The Coliseum Theatre in Aberdare which seats approximately 600 people. Although performing arts is usually the main function for these theatres, most have diversified to provide other services such as a cinema, live-music or evening/after school class space.

Figure 5.7: Soar Centre, Pen-y-Graig (opened June 2006)

5.34 In terms of building quality, we believe all theatres in the Borough are in a relatively reasonable state of repair. In particular the new Soar Centre in Pen-y-Graig is highlighted as being of an extremely high-quality in terms of its interior and exterior appearance as well as the facilities provided. Whilst some other facilities have substantial capital repair needs which may have budget implications for the Council. For example the Park and Dare Theatre in Treorchy, the Muni Arts Centre and the Coliseum Theatre in Aberdare, principally due to the age of each facility, are in need of some maintenance and/or repair work, they provide a wide range of programmes and events.

5.35 Noteworthy is the Borough's leaflet 'LIVE!' which details a varied and relatively high-profile programme of events for the Borough's three main theatre venues – the Coliseum Theatre in Aberdare, the Muni Arts Centre in Pontypridd and the Park and Dare Centre in Treorchy. Scheduled acts range from comedy, live music, drama and dance.

Figure 5.8: Phoenix Community Cinema and Theatre, Ton Pentre

5.36 Most theatre facilities in the Borough are provided as part of a multi-functional resource which often includes a café, art gallery, bar, conference centre and in some cases a cinema screen or as part of a wider educational facility such as college or learning centre. This arrangement is illustrated at the Parc Hall, Cwmparc which provides a theatre, live music venue and community space for various classes. This multi-functional arrangement was found to be advantageous and necessary in some circumstances in order to ensure that a theatre use remains viable.

5.37 These findings should be compared with the results of the Council's own Cultural Services Customer Satisfaction Survey (undertaken in 2008) which revealed, of those that visit such venues, the Park and Dare Theatre was the venue which was most frequently attended, with 23% of respondents (out of 600) stating they had attended the venue. This is compared with some 18% for the Coliseum Theatre in Aberdare and 17% for the Muni Arts Centre in Pontypridd. Whilst 97% of respondents were very satisfied and satisfied with the Borough's art venues, only 2% were dissatisfied and no respondents felt very dissatisfied. This was mirrored in opinion of the programmes offered.

5.38 The existing provision therefore appears to be meeting the qualitative needs of residents.

Nightclubs

5.39 There are approximately ten nightclubs located within Rhondda Cynon Taff.

5.40 The facilities range in type from conventional nightclubs providing dancing and DJ e.g. Kudos Late Lounge and Bar, Pontypridd, to late-night, alternative live-music venues such as Clwb-y-Bont in Pontypridd. Nightclub venues are also provided as part of an existing hotel use, this format is found at the Legends Hotel in Pontyclun.

5.41 There is a reasonable range of nightclub venues although most are located in the southern strategic area. In addition, most venues are focussed in the principal town of Pontypridd (Southern Strategic Area) and to a lesser extent the principal town of Aberdare (Northern Strategic Area). A number of smaller-scale nightclubs or late-night bars are located in Porth, Pentre, Llantrisant and Pontyclun.

Summary

5.42 There is reasonable existing provision across the Borough, and no expressed demand for additional facilities.

Live music venues

5.43 There are currently a large range of venues which can accommodate live-music gigs. These include some theatres, community centres, nightclubs and pubs. Most of these venues are not purpose-built and comprise of existing leisure facilities which have diversified to offer live-music as a subsidiary function.

5.44 Namely, venues such as Clwb-y-Bont in Pontypridd have emerged as important Welsh language, rock music venues. Other venues include Parc Hall, Cwmparc which also serves as a rock music venue, the Park and Dare Theatre, Treorchy, the Muni Arts Centre, Pontypridd and Cwmaman Institute who provide venues for specialist music including blues, male voice choirs, jazz and world music, the Pop factory in Porth which provides a number of spaces for rock music performances and Tom's Rock Bar, Treforest which is also a rock venue.

Summary

5.45 The survey results found no respondents would like additional live music venues within the Borough. Presently this seems to be better served by diversifying the offer of existing theatre/arts centre, pub and nightclub facilities.

Dance studios

5.46 The Borough has a number of dance facilities which are most often located as part of a large multi-functional facility. Dance studios and specialised sprung dance floors are available at a number of venues around the Borough, such venues include the Llwynypia Community and Arts Centre, Coleg Morgannwg, the Park and Dare Theatre, Muni Arts Centre, the Cwmaman Institute, Llantrisant Community Hall and the Soar Centre, Pen-y-Graig. Regular dance classes and performances are held within these venues. In addition to existing facilities there are proposals to develop a dance studio in Pontypridd YMCA.

Summary

5.47 The household survey did not illustrate that there was great demand (qualitative or quantitative) for dance facilities within the Borough.

Restaurants, pubs and bars

5.48 The Borough benefits from over 50 restaurants. These outlets are well-distributed through the Borough and provide a reasonable range of cuisine including Indian, Chinese, Thai and traditional British Pub dishes.

5.49 There are a number of restaurant chain outlets in the Borough, principally McDonalds but also other chains such as Frankie & Benny's, Brewers Fayre, Nandos, Pizza Hut, Toby Carvery and Harvester are present. In most cases these chain restaurants are relatively small-scale units within established retail parks for example Nantgarw, Riverside and Talbot Green. However the vast majority of the Borough's restaurants are independent and are not chains or franchises.

5.50 A review of public houses and bars/wine bars revealed that the Borough has approximately 135 establishments (source: yell.com). These are well distributed throughout the Borough and vary considerably in terms of quality and ownership nature.

5.51 There does not appear to be any qualitative deficiencies in provision.

Bingo

Existing Provision

5.52 The Borough has five bingo halls, two of which are located in two of the Borough's principle towns Pontypridd (Stardust Clubs) and Aberdare (Top Ten Bingo). The remaining 3 bingo halls are located in Tonypandy (Judge's Hall Bingo), Nantgarw (Castle Leisure Ltd) and Porth (Top Ten Bingo).

5.53 The Castle Leisure Bingo facility at Nantgarw is a relatively new construction and is of a good, modern quality. The remaining facilities occupied by Judge's Hall Bingo in Tonypandy, Top Ten Bingo in Porth and Aberdare and Stardust Clubs in Pontypridd are not purpose-built facilities and operate from older, non-purpose built buildings . All 4 halls appear to be of a lower quality and in need of some maintenance and/or repair (see photographs below). Judge's Hall was the only bingo facility which was open at the time of a site visit; the hall was operating at approximately 50% capacity at 3pm in the afternoon and therefore considered to be relatively well used.

Figure 5.5: Judge's Bingo Hall, Tonypandy located in the former Judge's Hall (built in 1909)

Figure 5.6: Top Ten Bingo, Hannah Street, Porth

Existing Usage

5.54 Bingo usage is high within the study area at 15% of respondents participating. There is no specific favoured venue, with people tending to use their nearest facility which means the majority of visits stay within the boundaries of the Borough.

Future Need

5.55 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators, such as Mecca and Gala, require buildings of between 2,000 to 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 people within freestanding towns (source: BISL) .

5.56 The study area population (about 143,751 adults) could generate approximately 251,564 admissions based on the national participation rate (1.75 per adult), compared with the average of 113,000 admission per club. These figures suggest that the study area as a whole could accommodate 2 bingo clubs.

5.57 However, 5 bingo clubs already exist within the Borough. In addition, there are a further 4 clubs located in the surrounding area including both a Gala and a Castle bingo within Cardiff.

5.58 The household survey results indicated that the participation rate in the Borough is higher than the national average at around 2 – 3 visits per adult. No one venue dominates the market in the Borough. In Zone 1 the most popular destination was Aberdare, in Zone 2 it was Tonypandy, in Zone 3 it was Mountain Ash and Zone 4 it was Nantgarw.

5.59 Even at this higher than average participation rate, a quantitative demand for only 2.9 clubs is generated. Given that both national and local operators are present in the Borough and that, as identified in Section 2, admissions are projected to decline, the scope for potential for further facilities will be extremely limited.

Summary

5.60 There does not appear to be a significant qualitative or quantitative need for new bingo facilities in the Borough.

Tenpin Bowling

Existing Provision

5.61 There are currently two ten-pin bowling centres in the Borough, one at Tonyrefail (Rhondda Bowl, 14 lanes) and the other at Nantgarw (Bowlplex plc, 26 lanes).

5.62 Bowlplex is a modern, purpose built facility located within a wider Leisure Park. It provides a range of facilities including an American styled Grill, 13 pool tables, 2 bars and modern video world arcade.

5.63 Rhondda Bowl however, is a rather dated facility, located adjacent to Tonyrefail Leisure Centre which is currently under major refurbishment. Despite the facility's dated appearance, it provides a range of supplementary facilities including a café, pool tables and video games.

Existing Usage

5.64 Over the study area as a whole, 38% of respondents stated that they go tenpin bowling with the majority going to Bowlplex at Nantgarw (59%) followed by Rhondda Bowl (17%). The remainder travelled to tenpin bowling facilities outside of the Borough representing an outflow of 24%.

Future Need

5.65 Tenpin bowling centres require large buildings of between 2,300 to 4,200 sq m (25,000 to 45,000 sq ft) and are generally located in towns with a population of over 150,000 people.

5.66 The study area population (234,327 at 2008) is in theory capable of supporting 23 lanes based on one lane per 10,000 people rising to 24 lanes by 2016.

5.67 When comparing this with the existing provision of 40 lanes, there is an estimated surplus of 17 lanes at 2008 and 16 lanes at 2016.

5.68 Therefore it is considered that there is no theoretical quantitative need for additional bowling facilities within the Borough.

5.69 Nonetheless, a large proportion of the Borough's population are located more than 15 minutes away from these existing facilities (see Plan 6, Appendix B). Using GIS software it has been calculated that 107,538 residents live outside of this 15 minute drive time zone, which represents approximately 51% of RCT's total population.

5.70 Therefore, three scenarios have been tested (see Plans 7 - 9, Appendix B) in order to see if, in quantitative terms, the Borough can support additional tenpin bowling facilities and if so where the best location for these facilities would be. The three scenarios are as follows:

- Scenario 1 (Llantrisant): There is a population of approximately 77,521 at 2008 rising to 79,862 at 2016 within a 15 minute drive of the centre of Llantrisant which is large enough to support approximately 7-8 lanes. This is generally considered too small for a modern bowling alley, however, given the limited bowling facilities within the area it is considered that locating a tenpin bowling alley in the strategic area around Llantrisant would prevent leakage to facilities outside the Borough and support more sustainable travel patterns.

- Scenario 2 (Porth): There is a population of approximately 86,244 people at 2008 rising to 88,849 at 2016 within a 15 minute drive time of Porth which is enough to support 8 - 9 lanes. However, the proposed catchment area overlaps with that of Rhondda bowl and therefore Porth is not deemed to be a suitable location for an additional facility of this nature.

- Scenario 3 (Aberdare): There is a population of approximately 61,335 people at 2008 rising to approximately 63,187 at 2016 within a 15 minute drive time of Aberdare which is enough to support 6 bowling lanes. There is significant overlap between the proposed facility and the new leisure development in Merthyr Tydfil and therefore locating an additional facility in this location is unlikely to meet the needs of the existing underserved population. Furthermore, the population within a 15 minute drive is only large enough to support 6 lanes which is generally too small for a modern bowling facility.

Summary

5.71 From the three scenarios, it is considered that if the Council consider it prudent to provide additional bowling facilities to meet the needs of the Borough's residents then Llantrisant would be the most appropriate location due to its strategic positioning. The rest of the Borough is relatively well provided, especially with the new facility in Merthyr Tydfil and ultimately their catchments are too small to support additional bowling facilities. Therefore there is no perceived quantitative or qualitative need for additional facilities to the north of the Borough.

Health and Fitness Clubs

Existing Provision

5.72 There are currently 14 privately run health and fitness clubs in the Borough as listed in Appendix A.

5.73 'Curves for Women' represents the only fitness franchise which operates in the Borough, with four outlets.

5.74 Miskin Manor Country House Hotel is the only private club in the Borough which provides a swimming pool and Jacuzzi. Most other private health and fitness clubs provide gymnasium facilities such as a cardiovascular area, weight machine and free-weight area.

5.75 A large number (8 out of 14) of these private clubs are provided on Industrial Estates such as Coedcae Lane, Treforest and Aberaman.

5.76 In addition to the independent private leisure/entertainment facilities there are a variety of sports centres owned by Rhondda Cynon Taff Council. These include

Llantwit Fardre Leisure Centre which has squash courts, badminton courts, multi-gym and sports hall for activities such as netball and aerobics, Rhondda Cynon Taff Leisure Centre in Porth which has squash courts, swimming pool and fitness suite and Tonyrefail Leisure Centre which has fitness suite, sports hall, swimming pool and badminton courts.

5.77 A full audit of health and fitness facilities is included in Appendix A.

Existing Usage

5.78 A number of these facilities are 'pay as you go' facilities and it is therefore not possible to estimate current membership levels. The household survey indicated that 37% of respondents or a member of their household use health and fitness facilities on a regular (at least once a month) basis. Since this is a response for the household as a whole, it does not necessarily correspond that 37% of the population of the Borough visit the gym regularly, but does represent the maximum participation rate.

Future Need

5.79 The study area population is approximately 234,327 in 2008 rising to 242,376 by 2016. If the national average membership rate of 12% is assumed, this would correlate to about 28,000 places in 2008 increasing to about 29,000 in 2016 public and private membership places. If membership rates reached the US level of 15.6% this would correlate to, about 36,600 in 2008 and 37,800 places in 2016.

5.80 The household survey results indicated that approximately 15% of gym visits take place outside of the Borough, with 85% of trips retained in the Borough. If it is assumed that this level of leakage will continue, because people will combine gym visits with their place of work, then based on the national average membership rate (12%) this would generate current demand for 20 clubs in the Borough rising to 21 by 2016, assuming an average club membership of 1,200.

5.81 Currently there are 20 clubs in the Borough which have gym facilities and therefore it can be considered that current demand is being met. However, it is considered that many of the current facilities are unlikely to be large enough to support a membership of 1,200 and therefore there could be some latent demand.

5.82 If the participation rate reached the current US level, then it would suggest demand for 26 clubs, rising to 27 clubs by 2016.

5.83 The survey results indicate that the majority of local residents who use health and fitness facilities use the Council-run facilities mentioned above and from additional probing questions regarding these centres the majority appear to be happy with the facilities and the way they are run. However, there would appear to be a significant lack of national gym operators within RCT, although this lack does not appear to be encouraging a substantial amount of people to use such facilities outside the Borough and instead they are using the Council facility nearest to their home.

5.84 There are several national operator health clubs within the surrounding area including Esporta in Cwmbran and Bridgend and a Novotel, David Lloyd, Bannatyne's, Livingwell and four Fitness First's within the area of Cardiff. However, the number of respondents visiting these centres is relatively minimal with the exception of 14% of Zone 1 respondents visiting the JJB Fitness Centre in Merthyr Tydfil.

5.85 We have also used GIS software in order to determine the number of people within the Borough who live more than a 10 minute drive time away from a health and fitness centre. This has generated a figure of 29,499 at 2008 rising to 30,390 by 2016. If it is assumed that 85% of gym visits will continue to be retained in the Borough, this would equate to between 3009 – 3099 places or 2 – 3 health and fitness clubs at 2016.

5.86 The majority of the population with limited geographic access to local gym facilities are in the north of the Borough (see Plan 10, Appendix B). Based on a membership rate of 1,200 we have looked at two scenarios for locating gym facilities within the Borough (see Plans 11 - 12, Appendix B). These scenarios are as follows:

- Scenario 1 (Porth): There are approximately 45,997 people, rising to 47,386 by 2016 within a 10 minute drive time of Porth which could potentially generate a demand of between 4,692 – 4,833 places or 4 health and fitness clubs By 2016 Currently within this 10 minute catchment area are 2 existing clubs and therefore there would appear to be capacity for 2 additional clubs within this area.

- Scenario 2: (Aberdare): Within a 10 minute drive time of Aberdare there is a population of approximately 31,047 at 2008 rising to 32,355 by 2016 which could generate demand of between 3,167 – 3,300 places or 2 – 3 health and fitness clubs by 2016. Only 1 such club currently exists within this area and therefore it is considered that capacity remains for 1 – 2 health and fitness clubs within Aberdare.

Summary

5.87 In quantitative terms there would appear to be capacity for up to 4 health and fitness clubs within the Borough. In terms of their locations it is considered that Llantrisant and the south of the Borough are currently well catered for, even with projected increase in population.

5.88 Moving to the central area there is capacity to introduce further health and fitness facilities within the area of Porth which could support up to 2 additional clubs. Within the northern area of the Borough there is capacity to provide up to 2 additional clubs within the area of Aberdare.

5.89 There appears to be a qualitative gap in terms of the upper end of the market, however, it is questionable whether there would be sufficient demand for such facilities given the economic profile of the Borough.

Leisure Centres

5.90 The Council presently provides 13 leisure centres, two of which are currently under total and partial refurbishment (Tonyrefail Leisure Centre and Rhondda Sports Centre) and are due to re-open shortly. Of these 13 leisure centres, 10 contain swimming pools of 25 metres or less (Appendix A). There are no 50m swimming pools in the Borough with the nearest being located in Cardiff Bay at the Cardiff International Pool.

5.91 Most Council-owned leisure centres provide a gymnasium with cardiovascular area, weight machines and free weight area. Whilst a lesser number of leisure centres provide racquet facilities such as badminton and squash courts, such leisure centres include Llantwit Fardre Sports Centre, Michael Sobell Sports Centre and Hawthorn Leisure Centre.

5.92 The leisure-centres are dispersed around the Borough and located within most of the principle and key settlements in the Borough – apart from Llanharan, Hirwaun, Tonypandy and Treorchy.

5.93 There are two smaller community sports centres in Rhigos and Porth. Although these facilities are small-scale they provide important door-step facilities for the local population such as 5-a-side sports facilities, small gymnasium and weights facilities.

5.94 Plan 13 in Appendix B shows the 10 minute drive time catchments around the leisure centres, differentiating between those with and without swimming pools. The areas in red show the overlap in catchment areas between leisure centres that include swimming pools.

5.95 As can be seen there is significant overlap in the area served by Ferndale Swimming Pool, Tonyrefail Leisure Centre, Bronwydd Swimming Pool, RCT Sports Centre Pentre and Rhondda Fach Leisure Centre.

Summary

5.96 The Leisure Centres contribute to the health and fitness provision in the Borough, and other indoor leisure facilities. There is good coverage across the Borough although in areas of overlap, there could be an opportunity to consolidate facilities and focus resources in a more targeted manner.

Community Centres

5.97 There are 36 community centres within the Borough (see Appendix A) which are widely dispersed at locations including Hirwaun, Tonyrefail, Pontypridd and Llantrisant. These centres variety in quality and size. All facilities are small in scale and are accessible to regular users, who are often given a key to the premises or through the community centre contact who is able to supply a key for one-off users.

5.98 The majority of community centres provide a hall space, staging area and kitchen facilities. Following a number of interviews with community centre contacts, the centres were reported to be used on a daily basis, predominantly by the local community, for a variety of regular leisure classes such as dance, martial arts and exercise. In addition to these uses, premises are regularly used for after-school clubs, nursery classes, mother and baby groups as well as luncheon clubs for over 50s. All community centres are also made available for other one-off uses such as community plays and children's parties.

Summary

5.99 There is a good provision of community centres across the Borough and there does not appear to be need for new facilities. Given that there appears to be a lack of awareness across the Borough as to where ones local community centre is located, it is considered that there is scope to increase the profile and use of premises. There is an identified demand for more youth clubs in the Borough, and consideration should be given to whether existing community centres could be utilised for this purpose.

Other indoor leisure facilities

5.100 There are a number of bespoke indoor leisure attractions in the Borough which broaden the indoor leisure provision, including:

- The Rhondda Heritage Park
- Cynon Valley Museum
- Museum of Law and Order
- Rumble in the Jungle Playcentre, Tonypandy
- Nantgarw China Works Museum
- Pontypridd Museum and
- Model House Craft and Design Centre

5.101 The Borough does not benefit from any purpose-built casinos or ice-skating rinks. The nearest facilities are located in Cardiff some 10 miles from the southern most areas of Rhondda Cynon Taff Borough.

Market Demand

5.102 NLP circulated 60 questionnaires to a variety of leisure operators regarding whether they had a demand for new or additional floorspace within the Borough, and if so, where. The range of operators included gymnasium providers such as Esporta and David Lloyd, restaurant operators including Café Rouge and Ask, Bingo companies such as Gala Bingo and the Rank Group, cinema groups such as UCI and VUE, children's soft play operators such as Playzone and Jump and ten-pin bowling companies such as Hollywood Bowl and Bowlplex Plc.

5.103 Only 5 responses were received, resulting in an 8% response rate. This low response rate is likely to reflect an overall low demand for floorspace from national leisure operators.

5.104 3 replies were received from restaurant operators, 1 response was received from a ten-pin bowling provider and 1 reply was received from a children's soft play company. Of these 5 replies, 2 restaurant providers (Subway and KFC) expressed a requirement for new or expanded premises within Rhondda Cynon Taff. Both companies expressed an interest in Pontypridd, Llantrisant/Talbot Green, Tonypandy and Nantgarw. Whilst Subway required units of between 800-1200 sq. ft in the area, KFC required significantly larger units of around 2500 sq. ft. Unlike Subway, KFC also registered an interest in Porth.

5.105 The other remaining 3 companies (Ezeeplay Ltd, Bowlplex Plc and Greene King Plc) expressed no requirement for new or expanded premises within the given area. These companies provided a variety of reasons as to why they did not require space in the Borough, such reasons included: *"young business and not yet ready for expansion"* and *"outside acquisition strategy target area".*

5.106 In addition to the above operator survey, a search was conducted using Estates Gazette Interactive (EGi) - an internet based resource which provides information on a range of issues including property news, property availability and operator locational requirements. From this search (as shown in figure 5.9 below) it was revealed that 7 companies expressed a space requirement in the Borough. Identified companies included restaurant providers, a health and Fitness company, a snooker hall and ten-pin bowling operator. Of these companies, all had highlighted Pontypridd as a prospective town, whilst 6 (out of 7) companies were seeking space in Llantrisant, Porth and Tonypandy with 5 (out of 7) companies in Aberdare and Mountain Ash. No companies registered a space requirement in the Tonyrefail, Llanharan, Treorchy, Ferndale, Hirwaun and Nantgarw.

Figure 5.9: EGi Survey

Retailer	Location			Floorspace (Ft)		Town											
	Out of town	Edge of town	In town	Min	Max	Pontypridd	Llantrisant	Aberdare	Tonypandy	Tonyrefail	Llanharan	Treorchy	Mountain Ash	Porth	Ferndale	Hirwaun	Nantgarw
Burger King				46	321												
Greens Health & Fitness				N/A	6070												
KFC				809	N/A												
Las Iguanas				260	418												
Pizza Hut				296	N/A												
Rileys (snooker hall)				743	1394												
TGI Friday's				325	604												
Total Number of Requirements						7	6	5	6	-	-	-	5	6	-	-	-

6.0 CONCLUSIONS AND RECOMMENDATIONS

6.1 The review of indoor leisure provision in the Borough has been informed through a combination of methods, including a household survey, operator survey, review of market trends, review of policy, and a review of existing provision.

6.2 The socio-economic characteristics of the Borough may potentially reduce the number of individuals who are able to partake in leisure activities.

6.3 In policy terms it is evident that there is strong support, both in planning and through wider policy initiatives, for the retention and enhancement of indoor leisure provision in order to improve health and well-being in the Borough and is also supported in terms of improving quality of life, diversifying town centres and providing new economic opportunities.

Existing and Future Need

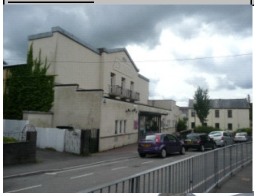
6.4 The south of the Borough appears to be well served by most indoor leisure facilities although need has been identified for some additional facilities if it is considered prudent to do so. Across the Borough as a whole it is considered that there is no latent or future need for additional:

- Bingo
- Theatres
- Restaurants, pubs and bars
- Community centres

6.5 There is considered to be quantitative need for up to a further 4 gyms by 2016, particularly national operators, with the most appropriate locations being in the north and mid of the Borough.

6.6 The nature of the Borough’s location between Bridgend and Cardiff means that a qualitative need for additional multiplex cinema and ten pin bowling facilities has been identified to the south of the Borough around the area of Llantrisant due to the strategic positioning of this area. However, there is limited quantitative need for either a new cinema or bowling facility and therefore the Council would need to consider the qualitative benefits of any proposals for such facilities in the south of the Borough over the potential loss of existing provision.

Appendix A Schedule of Existing Indoor Leisure Facilities

FACILITY	Address	Facilities & Scale
Cinema		
	**Coliseum Aberdare** Mount Pleasant St Trecynon Aberdare CF44 8NG	Theatre & Cinema 600 seat auditorium 3 function rooms Full Bar Catering facilities Disabled Facilities
	**Parc and Dare Theatre** Dyfodwg Street Treorchy CF42 6NL	Entertainment - cinema and theatre Dance classes and model railway club Refreshment, shop Disabled facilities
	**Cwmaman Institute** Aberdare	Concert hall Cinema Restaurant & Lounge Bar catering for 150 people weddings, parties live entertainment Disabled facilities
	Muni Screen /Muni Arts Centre Municipal Hall Gelliwastad Road Pontypridd CF37 2DP	1 screen, 300 seats
	**Phoenix Community Cinema & Theatre** Phoenix Centre, Church Rd, Ton Pentre, Pentre, Mid Glamorgan CF41 7EH	1 screen, 300 seats
	Showcase Cinema Hoel-yr Odyn Park Nantgarw Treforest Ind. Est. Treforest CF15 7QX	Booking/Film Information Line 12 Screen Cinema Free Parking Conference Facilities Gift Cards & Packs Available Party Room
Indoor Ten Pin Bowling		
	**Rhondda Bowl** Street: Waunrhydd Road Town: Tonyrefail County: Postcode: CF398EW	14 lanes, café
	Bowlplex plc Parc Nantgarw, Treforest Industrial Estate, Nantgarw, Cardiff, South Glamorgan CF15 7QX	Up To 26 Lanes Of Bowling Late Licensed Sports Bar American Pool Pit D J & Dance Floor Video World Action

Bingo		
	Stardust Clubs Ltd 75, High St, Pontypridd, Mid Glamorgan CF37 1QN	
	**Castle Leisure Ltd** St. Davids Close, Main Avenue, Treforest Industrial Estate, Pontypridd, Mid Glamorgan CF37 5UR	
	Top Ten Bingo Bridge St, Tonypandy, Mid Glamorgan CF40 2TU	
	**Top Ten Bingo** Canon St, Aberdare, Mid Glamorgan CF44 7AT	
LPA Leisure Centres		
	Abercynon Sports Centre Parc Abercynon Abercynon Rhondda Cynon Taf CF45 4LN	25m Pool Lounge Bar Lesser Hall for functions Large Main Hall consisting of 6 Badminton Courts Multi Gym, separate Loose Weights Room Health Suite Spa Bath Beauty Room and Toning Suite consisting of 6 Toning Beds
	Michael Sobell Sports Centre Ynys Aberdare CF44 0EA	Disabled parking Male / female changing rooms Outside changing facilities Family changing room and baby changing facilities
	**Llantrisant Leisure Centre** Southgate Park Llantrisant CF72 8DJ	Disabled parking Car parking Swimming Pool Shallow Learner pool Health suite Main hall Committee room Function suite Lounge bar Family bar Zenith fitness suite Loose weights area Changing rooms Squash courts
	Hawthorn Leisure Centre Fairfield Lane Rhydyfelin Pontypridd CF37 5LN	Zenith Fitness Suite Sports Hall Five badminton courts Two squash courts Tone Zone Health suite Function hall and bars Lounge Bar

	Llantwit Fardre Leisure Centre Central Park Church Village Pontypridd CF38 1RJ	Brand new Zenith gym, sports hall, two squash courts, Disabled parking, Male and Female changing rooms.
	Rhondda Fach Sports Centre, Tylorstown East Street Tylorstown Ferndale CF43 3HR	Sports (Main) Hall 8 Badminton courts 2 x 5-A-side Courts Basketball courts swimming pool Lesserhall- Cricket Nets & Badminton Courts Meeting room Zenith Fitness Suite
	Tonyrefail Leisure Centre and Pool Ty'n y Bryn Park Waunrhydd Road Tonyrefail CF39 8EW	Swimming Pool, Zenith fitness studio, sports hall, function hall and gallery area.
	Centre for Sport, Health & Exercise University of Glamorgan, Treforest, Pontypridd, Mid Glamorgan CF37 1DL	
	Rhondda Cynon Taff - Community Leisure Centre Rhiwgarn Rd, Porth, Mid Glamorgan CF39 9PX	
	Rhondda Sports Centre Gelligaled Park, Pentre, Mid Glamorgan CF41 7SY	
	Rhigos Community Sports Hall Rhigos, Aberdare, Mid Glamorgan CF44 9HJ	
Swimming Pool		
	Aberdare Swimming Pool (LPA) The Ynys Aberdare CF44 7RP	
	Hawthorn Swimming Pool (LPA) School Lane, Hawthorn, CF37 5AL	
	Ferndale Swimming Pool Excelsior Terrace, Maerdy, Ferndale, Mid Glamorgan CF43 4AP	
	**Bronwydd Swimming Pool, Porth (LPA)** Caemawr Road Porth RCT CF39 9BY	
	Treherbert Swimming Pool (LPA) Jubilee Park Park Close Treherbert CF42 5LD	

Theatres		
	Park & Dare Theatre, Treorchy	
	Gartholwg Lifelong Learning Centre, Church Village	A 100-150 audience capacity Overhead projector and screen facilities (DVD, VHS and PowerPoint) Moveable staging Grand Piano.
	Soar Centre, Pen-y-Graig	
	Coleg Morgannwg Performing Arts Centre, Llwynypia	
	Muni Arts Centre, Pontypridd	
	The Coliseum Theatre, Aberdare	
	Cwmaman Institute, Cwmaman	
	Parc Hall, Cwmparc	
	Phoenix Community Cinema & Theatre, Ton Pentre	
Community Centres		
	Blaencwm Community Centre	
	Cambrian Avenue Community Centre	
	Glyncoch Community Centre	
	Maes yr Haf Community Centre	
	Penrhiwfer Community Centre	
	Pontygwaith Community Centre	
	Talbot Green Com Centre & Pavilion	
	Tonteg Com Centre	
	Treforest Com Centre	
	Ynysmaerdy Com Centre	
	Beddau Community Centre	
	Brynna Community Centre	
	Cilfynydd & Norton Bridge Community Centre	
	Llanharry Community Centre	
	Pantygraigwen Community Centre	
	Pontyclun Community Centre	

	Southgate Park Pavilion	
	Thomastown Com Centre	
	Trallwn Com Centre	
	Tylagarw Com Centre	
	Bryncae Community Centre	
	Dai Davies Community Centre	
	Hawthorn Community Centre	
	Oxford Hall	
	Penygawsi Community Centre	
	Rhydyfelin Community Centre	
	Tawelfryn Community Centre	
	Tonyrefail Com Centre	
	Ty Rhiw Community Centre	
	Ynysybwl Community Centre	

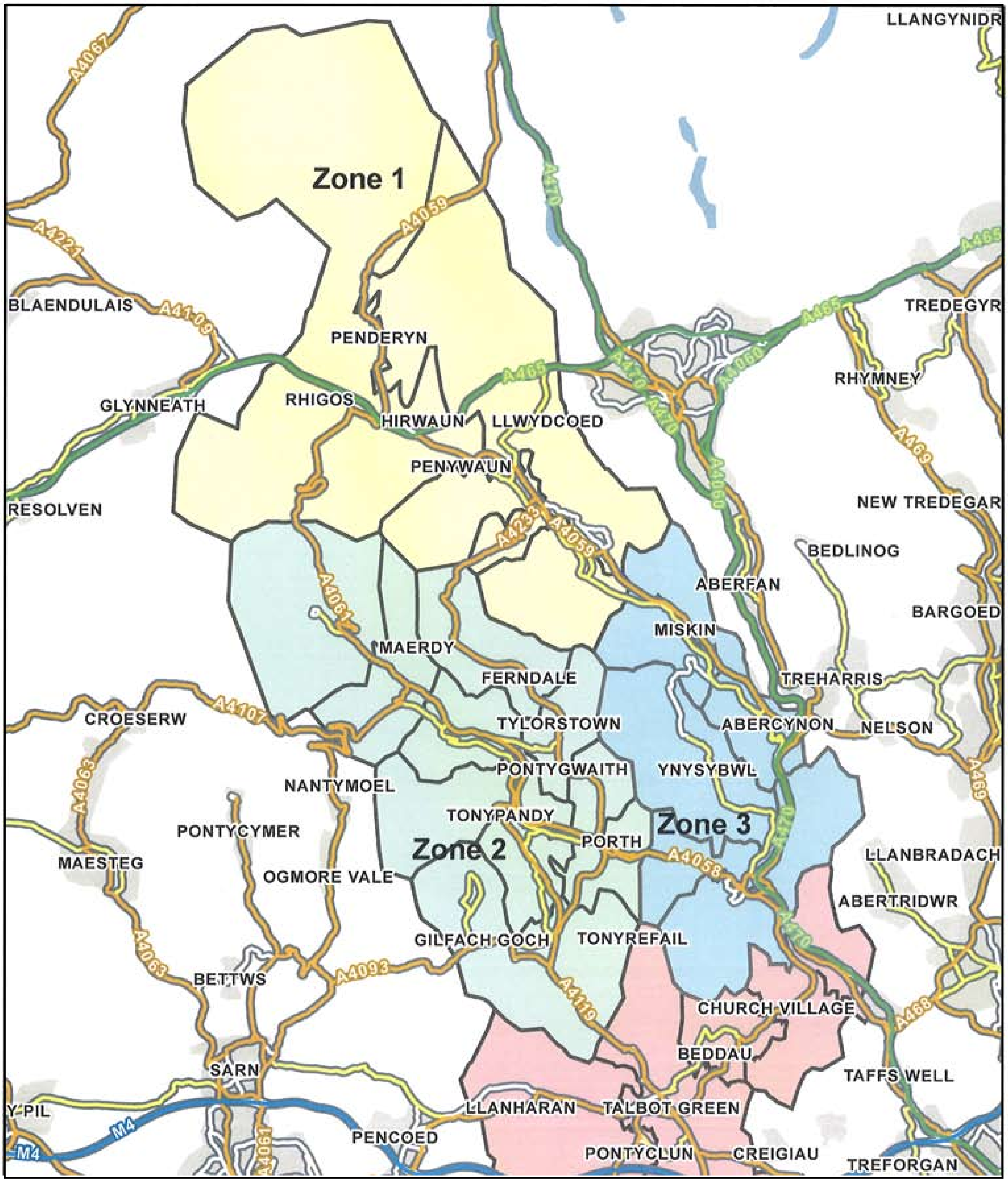
Leisure Centre and Gym Facilities in RCT

Facility	Curves For Women				Boxing For Fitness	Rhondda Cynon Taff - Leisure Centre	Miskin Manor Country House Hotel	Llantwit Fardre Sports Centre	Tonyrefail Leisure Centre	Ferndale Swimming Pool
	Tonypandy	Pontyclun	Treforest Industrial Estate	Aberdare	Pontyclun	Porth	Pontyclun	Church Village	Tonyrefail	Maerdy
Gymnasium Facilities										
Cardiovascular area	✓	✓	✓	✓			✓	✓	✓	
Weight machines							✓	✓	✓	
Free weight area							✓	✓	✓	
Personal Trainer	✓	✓	✓	✓	✓			✓	✓	
Studio							✓			
Classes and Clubs										
Aerobics							✓	✓	✓	
Pilates							✓	✓		
Spinning										
Yoga							✓	✓		
Other					✓		✓		✓	
Swimming and Spa Facilities										
Indoor										
Swimming Pool - Small (L = < 25m)							✓			✓
Swimming Pool - Large (L = > 25m)										
Children's Pool										
Swimming Lessons									✓	✓
Jacuzzi/Whirlpool							✓			
Sauna										
Steam Room										
Sun beds										
Sports Facilities										
Sports hall						✓		✓	✓	
Outdoor Football Pitch						✓		✓		
Indoor Football Pitch										
Basketball Court										
Other					✓			✓		
Racquets Facilities										
Outdoor Tennis Courts										
Indoor Tennis Courts										
Badmington Courts							✓	✓	✓	
Squash Courts							✓	✓		
Other										
Additional Facilities										
Conference/meeting rooms for hire							✓			
Venue/Party hire							✓	✓	✓	
Café and Restaurant						✓	✓			
Bar							✓			
Lounge						✓	✓			
Health and beauty salon							✓			
Children's creche										
Internet Access							✓			
Other						✓				

	Powerhouse Gym	Llantrisant Leisure Centre	Crown Fitness Club	Michael Sobell Sports Centre	Hawthorn Leisure Centre	First Choice Fitness Ltd	Abercynon Sports Centre	Strides Health & Fitness Club	1 2 1 Health & Fitness Club	Rhondda Fach Sports Centre
Gymnasium Facilities	Aberaman	Llantrisant	Llantwit Fardre	Aberdare	Hawthorn	Pontyclun	Abercynon	Pentre	Treforest Ind Est	Tylorstown
Cardiovascular area	✓	✓	✓		✓	✓	✓	✓	✓	✓
Weight machines	✓	✓	✓		✓	✓	✓	✓	✓	✓
Free weight area	✓	✓	✓		✓	✓	✓	✓	✓	✓
Personal Trainer	✓		✓			✓		✓	✓	
Studio										
Classes and Clubs										
Aerobics		✓		✓	✓	✓	✓	✓	✓	
Pilates			✓			✓		✓		
Spinning			✓					✓		
Yoga		✓				✓	✓	✓	✓	
Other		✓		✓	✓		✓			✓
Swimming and Spa Facilities										
Indoor										
Swimming Pool - Small (L = < 25m)		✓					✓			✓
Swimming Pool - Large (L = > 25m)										
Children's Pool		✓								
Swimming Lessons		✓					✓			✓
Jacuzzi/Whirlpool										
Sauna										
Steam Room										
Sun beds										
Sports Facilities										
Sports hall					✓					✓
Outdoor Football Pitch		✓		✓			✓			
Indoor Football Pitch										✓
Basketball Court										
Other										✓
Racquets Facilities										
Outdoor Tennis Courts										
Indoor Tennis Courts				✓						
Badmington Courts		✓		✓	✓		✓			✓
Squash Courts				✓	✓					
Other		✓	✓	✓						✓
Additional Facilities										
Conference/meeting rooms for hire		✓		✓	✓					✓
Venue/Party hire		✓		✓	✓		✓			✓
Café and Restaurant										
Bar		✓			✓		✓			
Lounge					✓					
Health and beauty salon		✓	✓		✓		✓	✓	✓	
Children's creche										
Internet Access										
Other										

	Energetic Fitness Centre	Hawthorn Swimming Pool	Bronwydd Swimming Pool	Treherbert Swimming Pool	Rhigos Community Sports Hall	Centre for Sport, Health & Exercise	Rhondda Sports Centre	Energise Health & Fitness Centre Ltd
	Treorchy	Hawthorn	Porth	Treherbert	Rhigos	University of Glamorgan, Treforest	Pentre	Pontypridd
Gymnasium Facilities								
Cardiovascular area	✓		✓			✓	**currently closed**	✓
Weight machines	✓		✓		✓	✓		✓
Free weight area	✓		✓			✓		✓
Personal Trainer	✓					✓		✓
Studio								
Classes and Clubs								
Aerobics			✓		✓			✓
Pilates								
Spinning								
Yoga	✓							✓
Other	✓					✓		
Swimming and Spa Facilities								
Indoor								
Swimming Pool - Small (L = < 25m)		✓	✓	✓				
Swimming Pool - Large (L = > 25m)								
Children's Pool			✓					
Swimming Lessons		✓	✓	✓				
Jacuzzi/Whirlpool								
Sauna								
Steam Room						✓		
Sun beds								
Sports Facilities								
Sports hall					✓	✓		
Outdoor Football Pitch								
Indoor Football Pitch								
Basketball Court								
Other								
Racquets Facilities								
Outdoor Tennis Courts								
Indoor Tennis Courts								
Badmington Courts						✓		
Squash Courts						✓		
Other						✓		
Additional Facilities								
Conference/meeting rooms for hire								
Venue/Party hire								
Café and Restaurant								
Bar								
Lounge								
Health and beauty salon			✓					✓
Children's creche								
Internet Access								
Other								

Appendix B – Relevant Plans

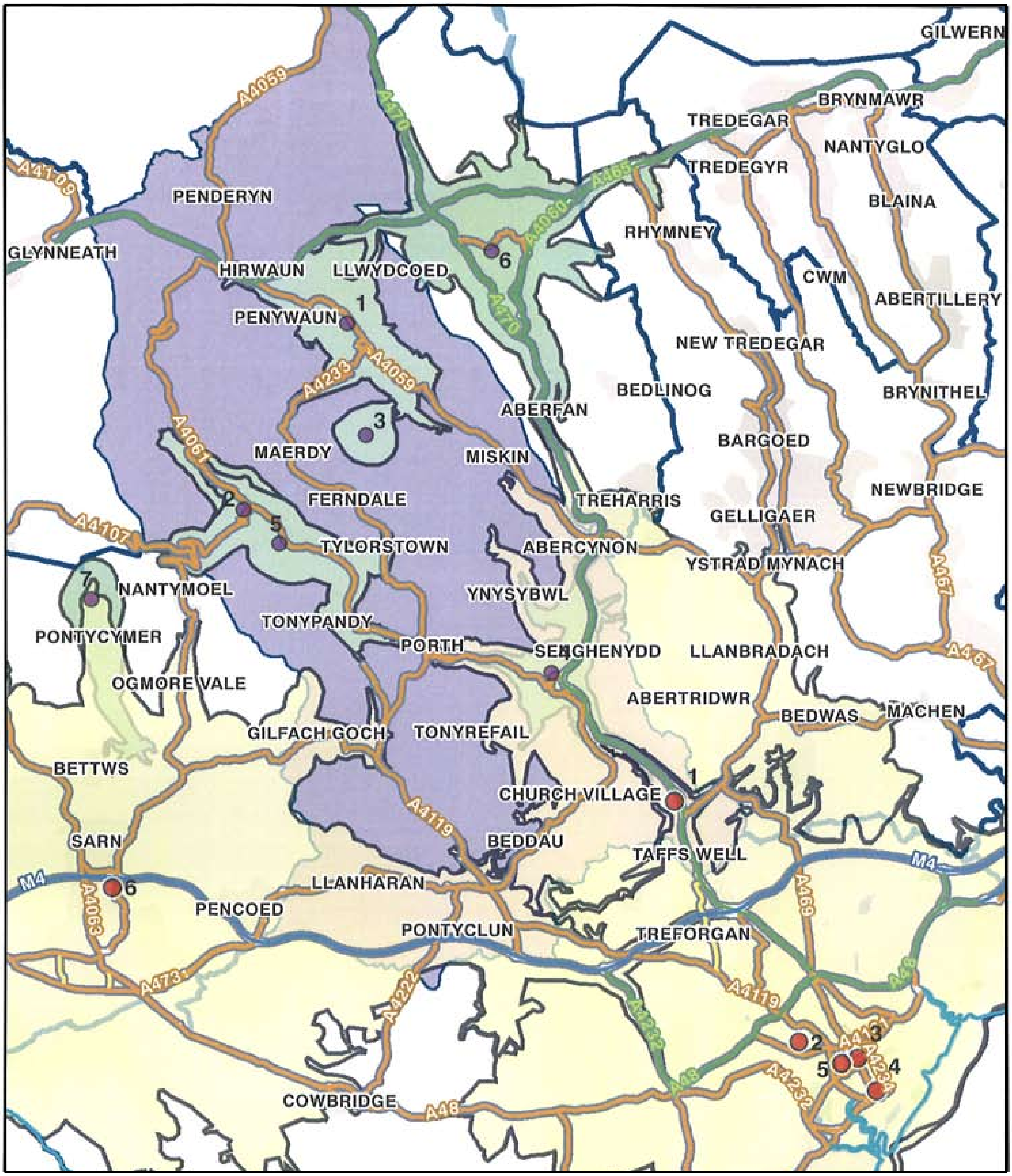


Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan1** **Study Area Plan**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

N

IL30506-001



KEY

Multiplex Cinema Catchments Areas (20 mins drive time)		Showcase cinema, Nantgarw	1	The Coliseam, Aberdare	1
Single screen cinema catchments (10 mins drive time)		Chapter Arts Centre, Canton	2	Parc and Dare, Treorchy	2
Areas of borough not convered within cinema catchments		Red Dragon Centre, Cardiff Bay	3	Cwmaman Institute, Cwmaman	3
		Cineworld, Cardiff	4	The Muni Arts Centre, Pontypridd	4
		Vue, cardiff	5	Phoenix Community Cinema, Ton Pentre	5
		Odeon, Bridgend	6	Castle Cinema, Merthyr Tydfil	6
				Valley and Vale Arts Centre, Blaengarw	7

nlp Nathaniel Lichfield and Partners

Project RCT Leisure Study

Title **Plan 2 Existing Cinema's and Catchments**

Client Rhondda Cynon Taf County Borough Council

Date July 2008

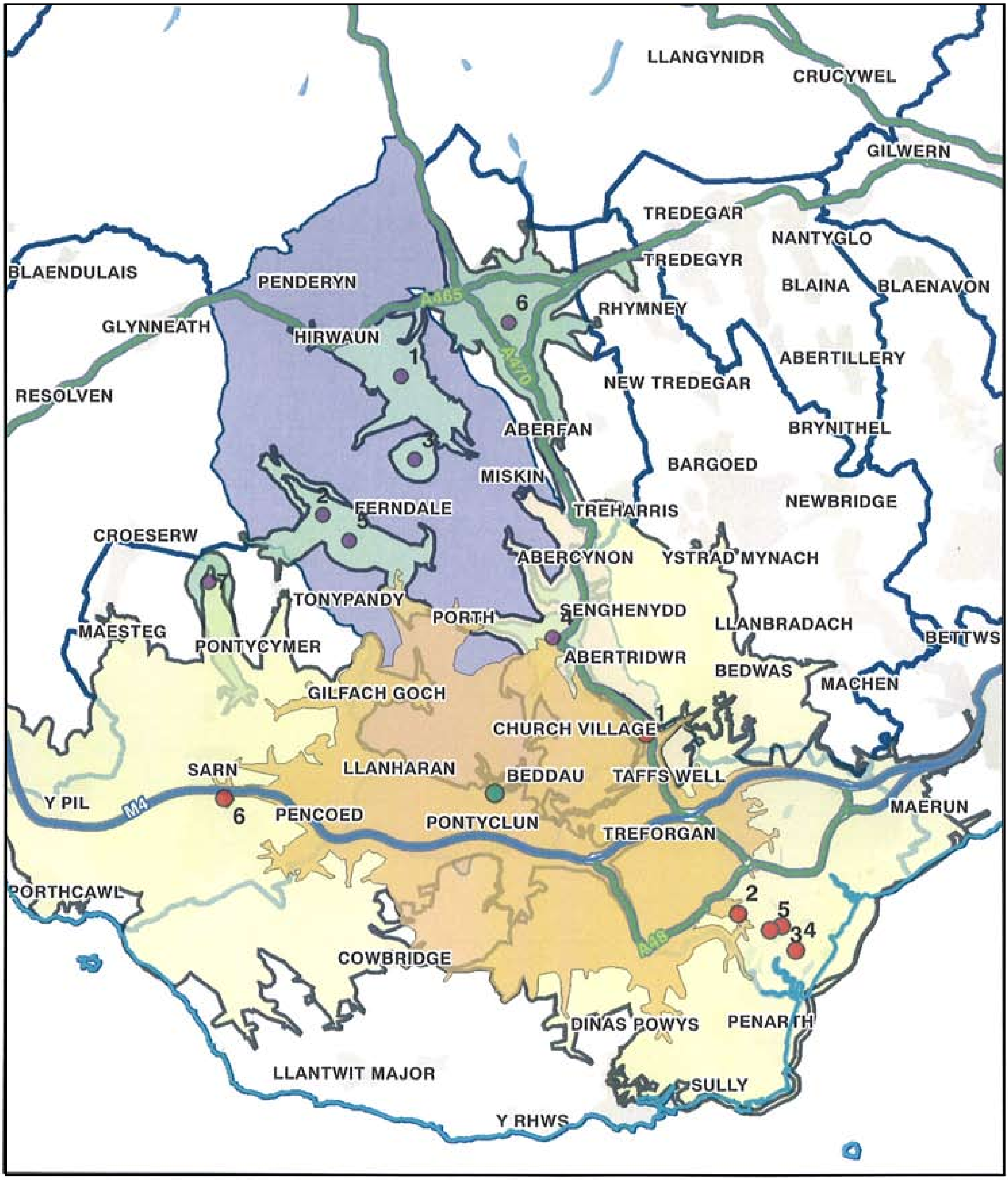
Scale NTS

Drawn by IJ

Drg. No IL30506/001

N

IL30506-002



KEY

- Catchment area of new multiplex cinema in Talbot Green
- Multiplex Cinema Catchments (10 mins drive time)
- Single screen cinema catchments
- Areas of borough not convered within cinema catchments
- Potential New Multiplex Cinema, Talbot Green

Showcase cinema, Nantgarw 1
Chapter Arts Centre, Canton 2
Red Dragon Centre, Cardiff Bay 3
Cineworld, Cardiff 4
Vue, cardiff 5
Odeon, Bridgend 6

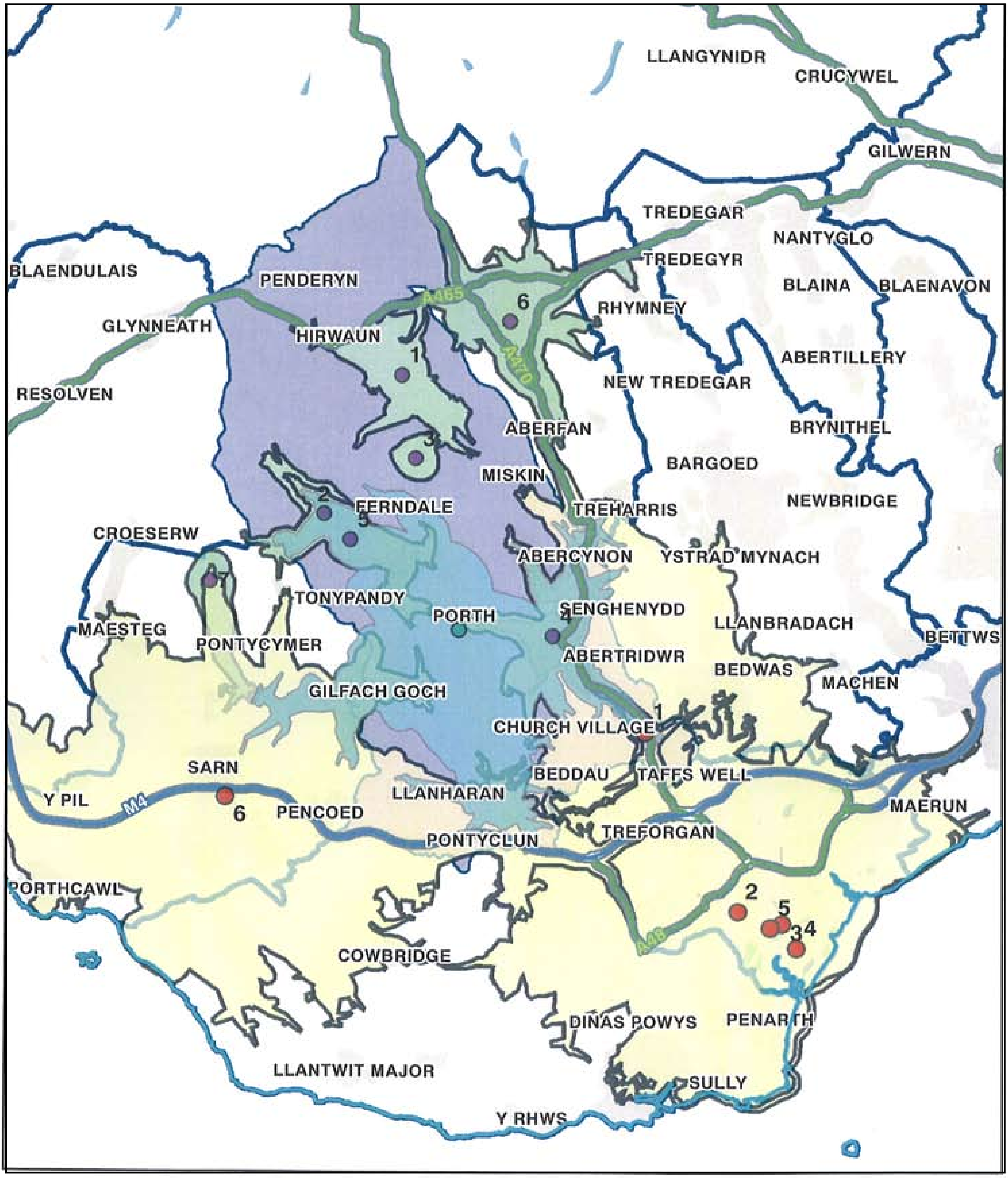
The Coliseam, Aberdare 1
Parc and Dare, Treorchy 2
Cwmaman Institute, Cwmaman 3
The Muni Arts Centre, Pontypridd 4
Phoenix Community Cinema, Ton Pentre 5
Castle Cinema, Merthyr Tydfil 6
Valley and Vale Arts Centre, Blaengarw 7

nlp Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 3 New Cinema Scenario 1**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

N

IL30506-003



KEY

Multiplex Cinema Catchment Areas (20 mins drive time)

Single Screen Cinema Catchments (10 mins drive time)

Areas of Borough not Covered within cinema catchments

Catchment area of new multiplex in Porth

Potential New Multiplex Cinema, Porth

Showcase cinema, Nantgarw 1

Chapter Arts Centre, Canton 2

Red Dragon Centre, Cardiff Bay 3

Cineworld, Cardiff 4

Vue, cardiff 5

Odeon, Bridgend 6

The Coliseam, Aberdare 1

Parc and Dare, Treorchy 2

Cwmaman Institute, Cwmaman 3

The Muni Arts Centre, Pontypridd 4

Phoenix Community Cinema, Ton Pentre 5

Castle Cinema, Merthyr Tydfil 6

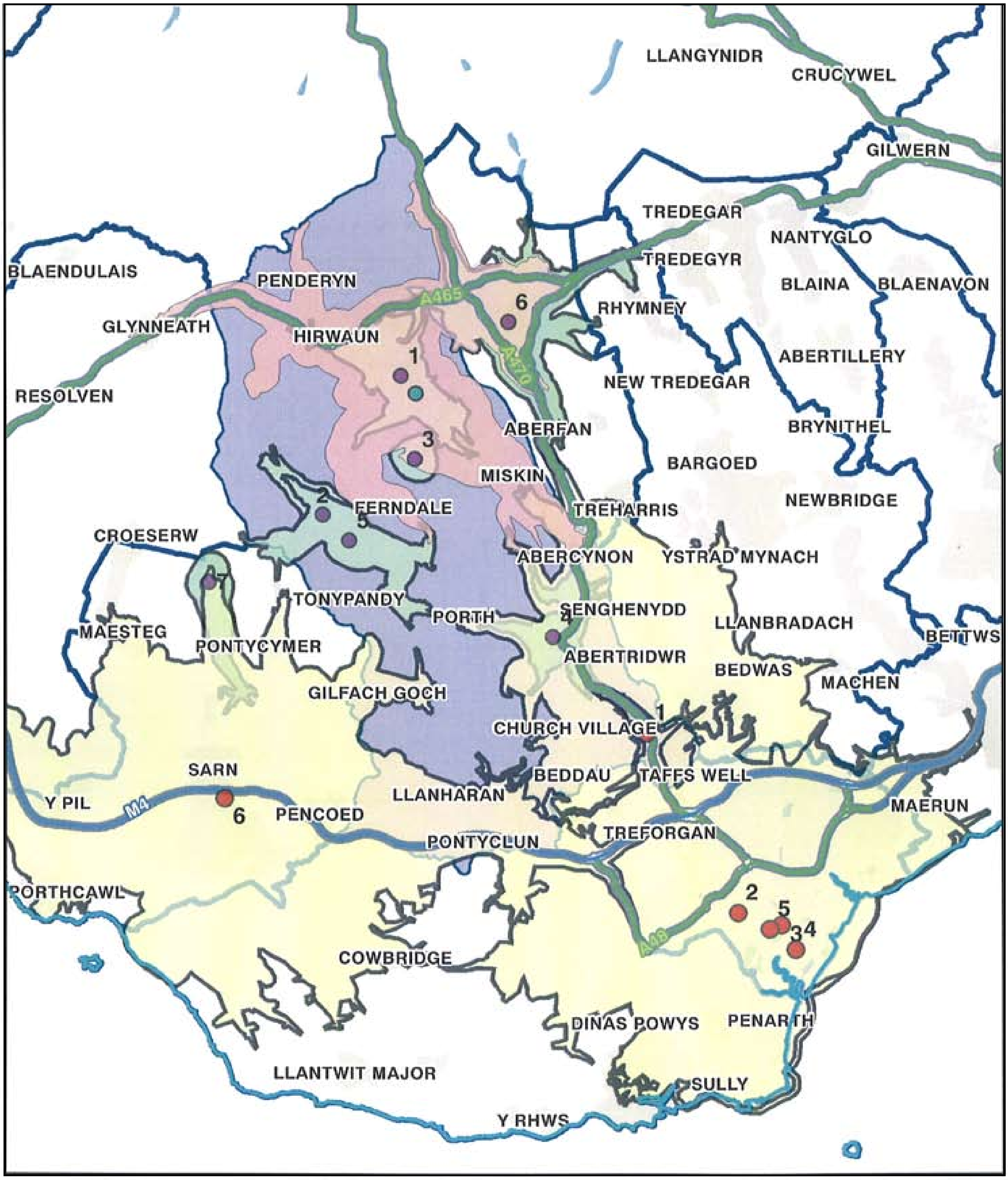
Valley and Vale Arts Centre, Blaengarw 7

nlp Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 4 New Cinema Scenario 2**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

N

IL30506-004



KEY

- Multiplex Cinema Catchment Areas (20 mins drive time)
- Single Screen Cinema Catchments (10 mins drive time)
- Areas of Borough not Covered within cinema catchments
- Catchment area of new multiplex in Aberdare
- Potential New Multiplex Cinema, Aberdare

1. Showcase cinema, Nantgarw
2. Chapter Arts Centre, Canton
3. Red Dragon Centre, Cardiff Bay
4. Cineworld, Cardiff
5. Vue, cardiff
6. Odeon, Bridgend

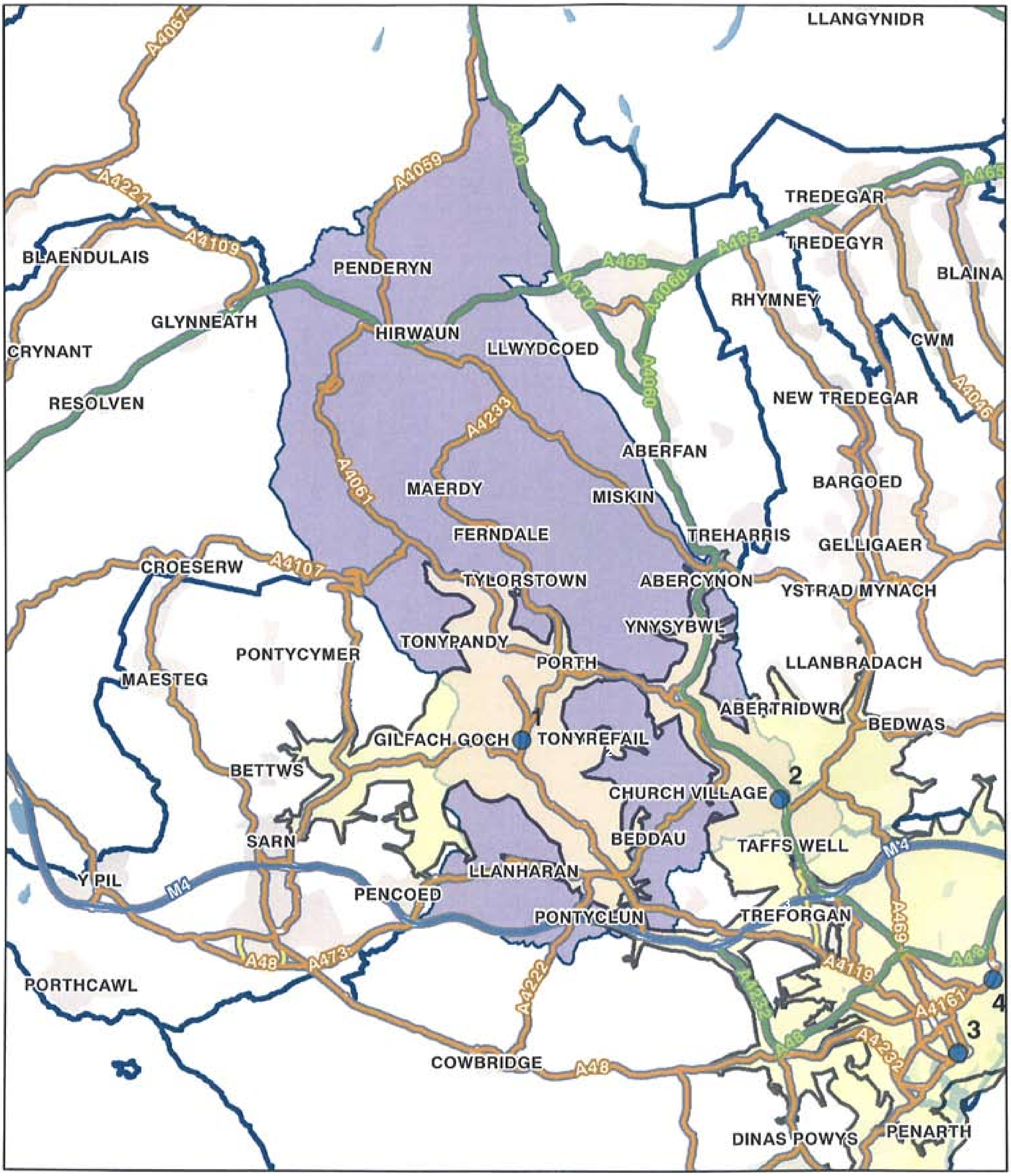
1. The Coliseam, Aberdare
2. Parc and Dare, Treorchy
3. Cwmaman Institute, Cwmaman
4. The Muni Arts Centre, Pontypridd
5. Phoenix Community Cinema, Ton Pentre
6. Castle Cinema, Merthyr Tydfil
7. Valley and Vale Arts Centre, Blaengarw

nlp Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 5** **New Cinema Scenario 3**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

N

IL30506-005



KEY

Existing Bowling Catchment Areas (15 mins drive time)

Areas of Borough not Covered within Bowling Alley Catchments

EXISTING BOWLING FACILITIES

Rhonnda Bowl, Tonyrefail 1

Bowlplex, Nantgarw 2

Tenpin, Newport Road 3

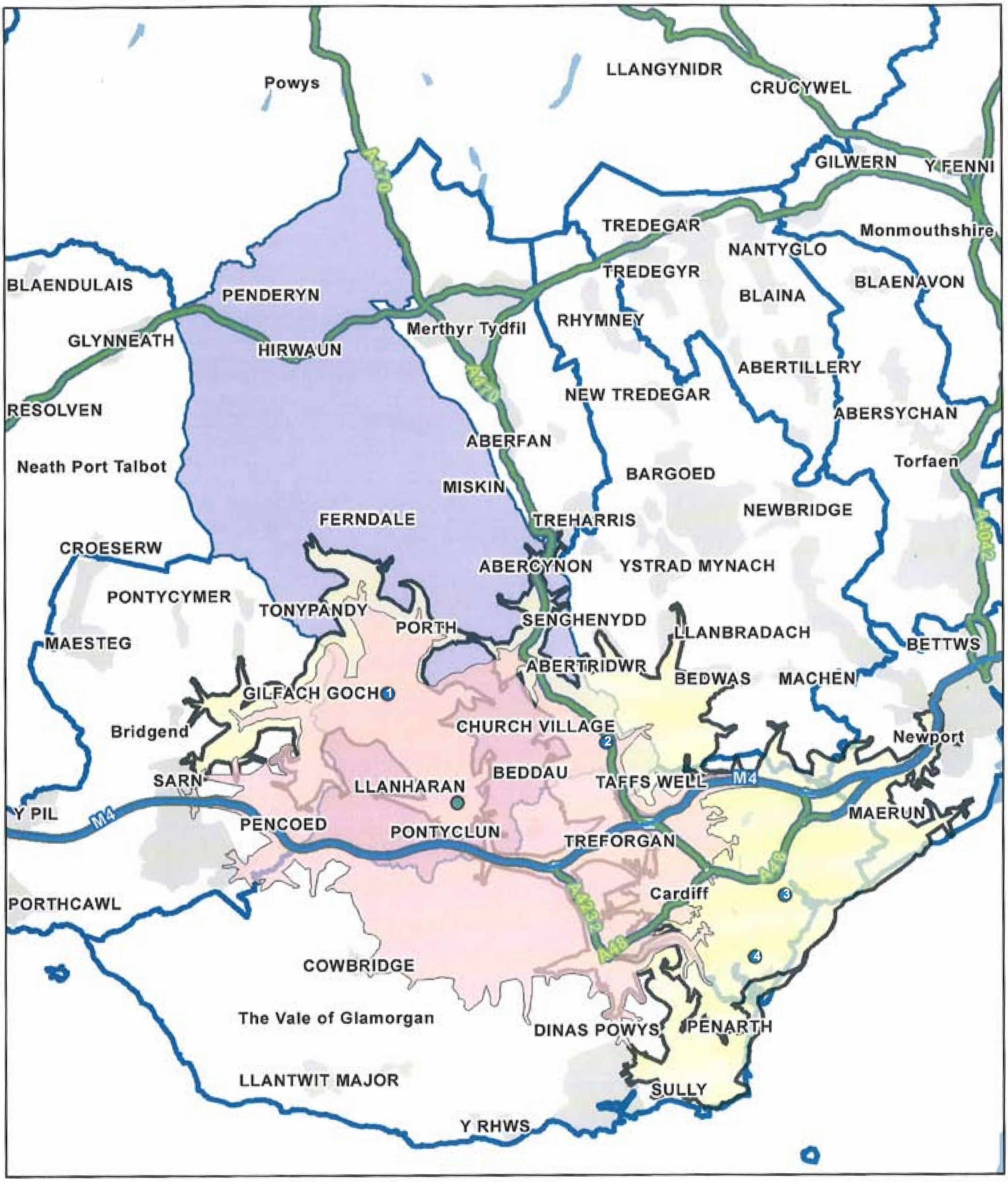
Hollywood Bowl, Red Dragon Centre 4

Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 6 Existing Tenpin Bowling Centres and catchment areas**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

N

IL30506-006



KEY

Existing Bowling Catchment Areas (15 mins drive time)		Rhonnda Bowl, Tonyrefail	1
Areas of Borough not Covered within Bowling Alley Catchments		Bowlplex, Nantgarw	2
		Tenpin, Newport Road	3
Catchment Area of New Bowling Facility in Talbot Green		Hollywood Bowl, Red Dragon Centre	4
Potential New Bowling Facility in Talbot Green			

nlp Nathaniel Lichfield and Partners

Project: RCT Leisure Study

Title: **Plan 7**
New Tenpin Bowling Scenario 1

Client: Rhondda Cynon Taf County Borough Council

Date: July 2008

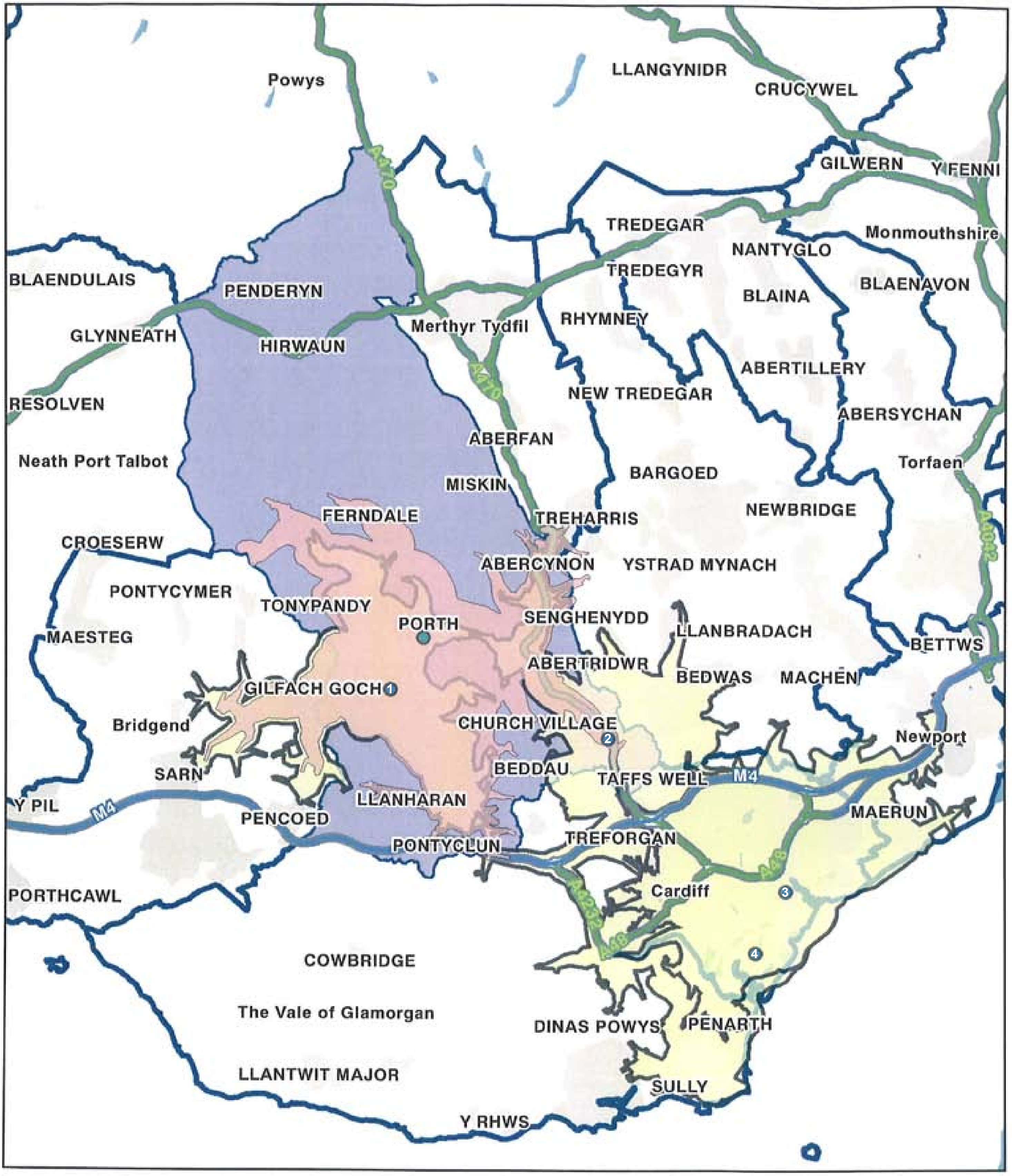
Scale: NTS

Drawn by: IJ

Drg. No: IL30506/001

N

IL30506-007



KEY

Existing Bowling Catchment Areas (15 mins drive time)

Areas of Borough not Covered within Bowling Alley Catchments

Catchment Area of New Bowling Facility in Porth

Potential New Bowling Facility in Aberdare Porth

Rhonnda Bowl, Tonyrefail (1)

Bowlplex, Nantgarw (2)

Tenpin, Newport Road (3)

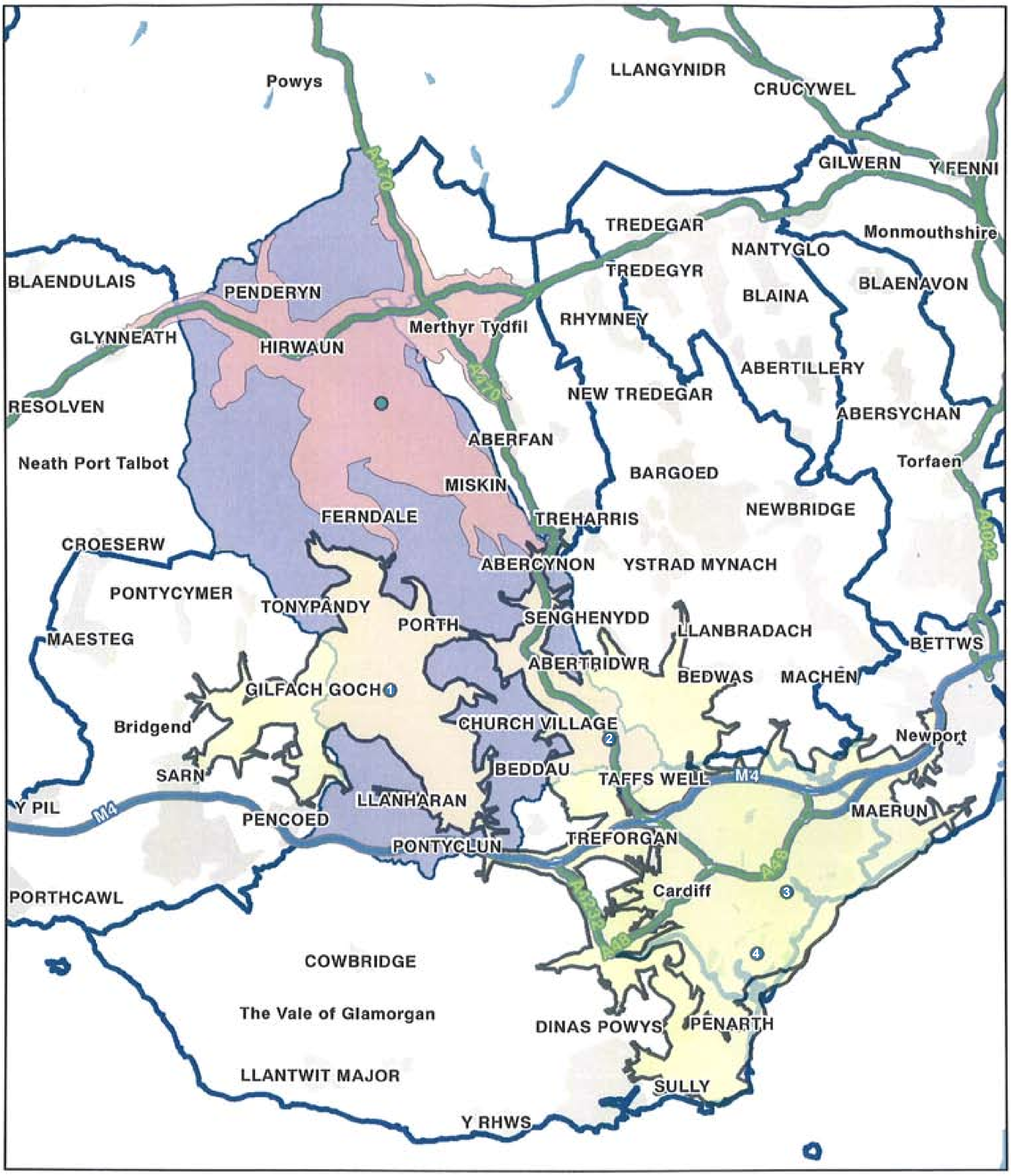
Hollywood Bowl, Red Dragon Centre (4)

nlp Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 8 New Tenpin Bowling Scenario 2**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

N

IL30506-008



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Existing Bowling Catchment Areas (15 mins drive time)		Rhonnda Bowl, Tonyrefail	1
Areas of Borough not Covered within Bowling Alley Catchments		Bowlplex, Nantgarw	2
Catchment Area of New Bowling Facility in Aberdare		Tenpin, Newport Road	3
Potential New Bowling Facility in Aberdare		Hollywood Bowl, Red Dragon Centre	4

nlp Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 9** **New Tenpin Bowling Scenario 3**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

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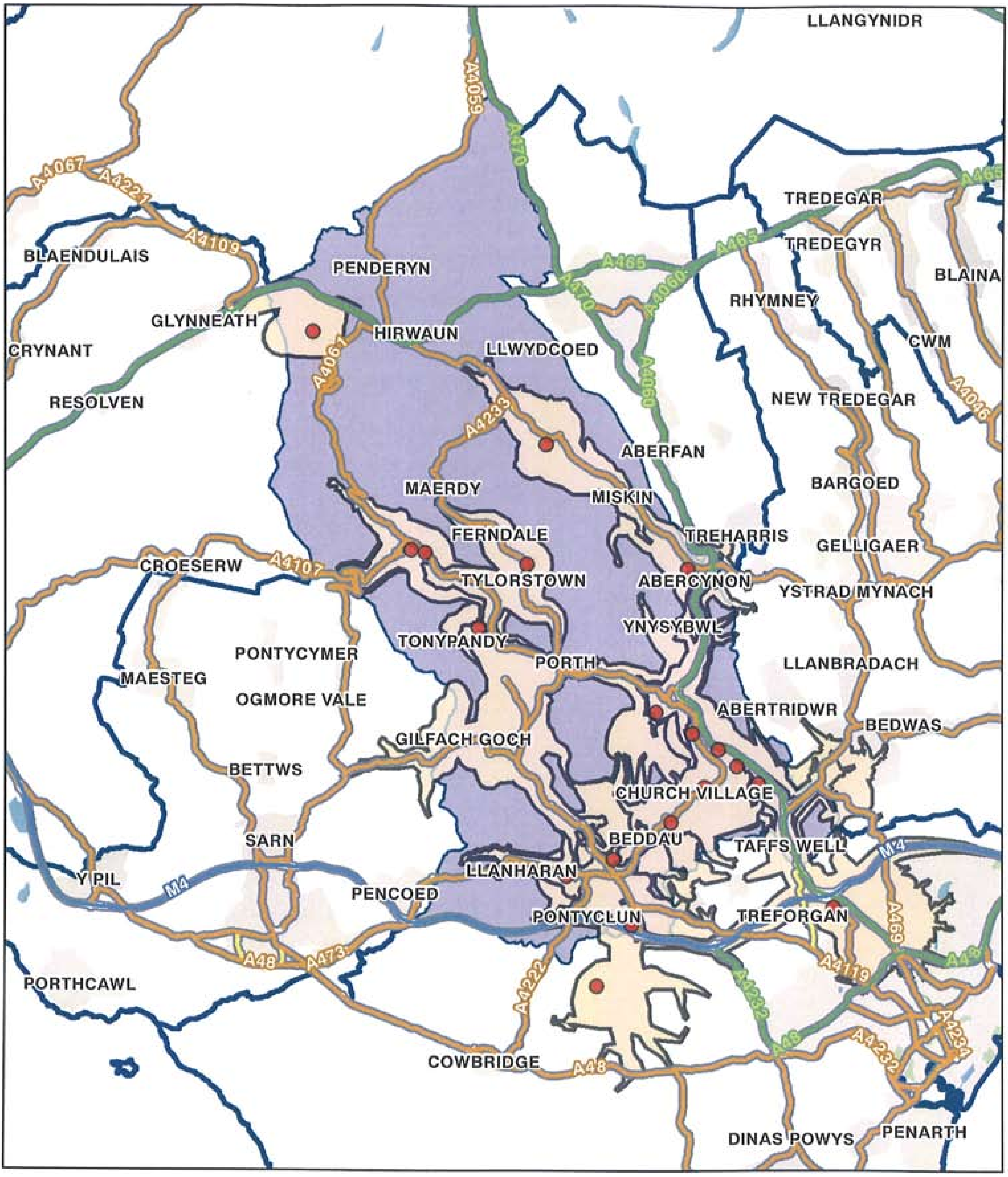
IL30506-009



KEY

Existing gym locations

Existing Gyms Catchment Area (10 mins drive time)

Areas of Borough not Covered within Gym Catchments

nlp Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 10 Existing Gyms and Catchment areas**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

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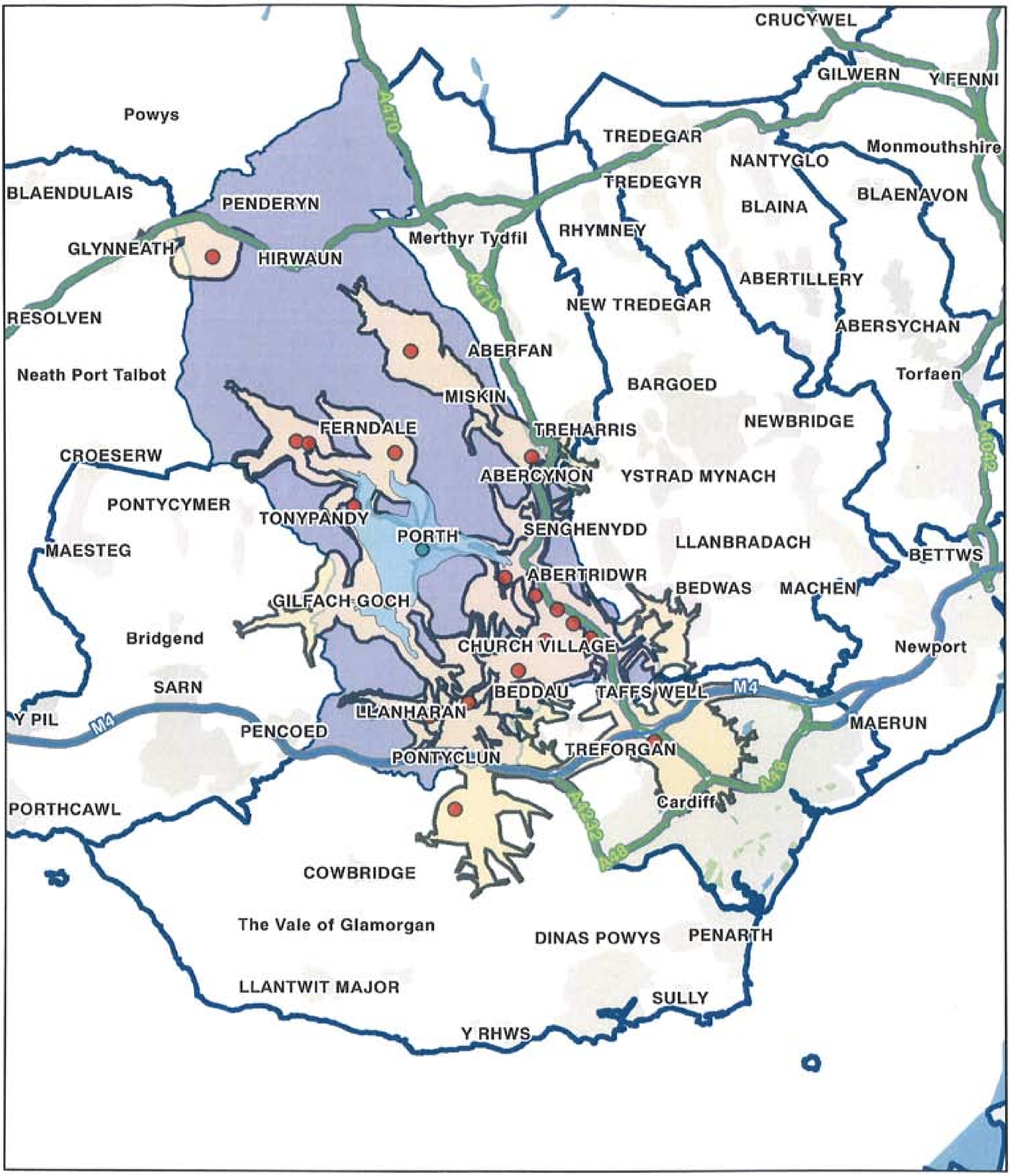

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Existing Gyms Catchment Area (10 mins drive time)	
Areas of Borough not Covered within Gym Catchments	
Catchment Area of New Gym in Porth	
Potential New Gym in Porth	

Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 11** **New Gym Scenario 1**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

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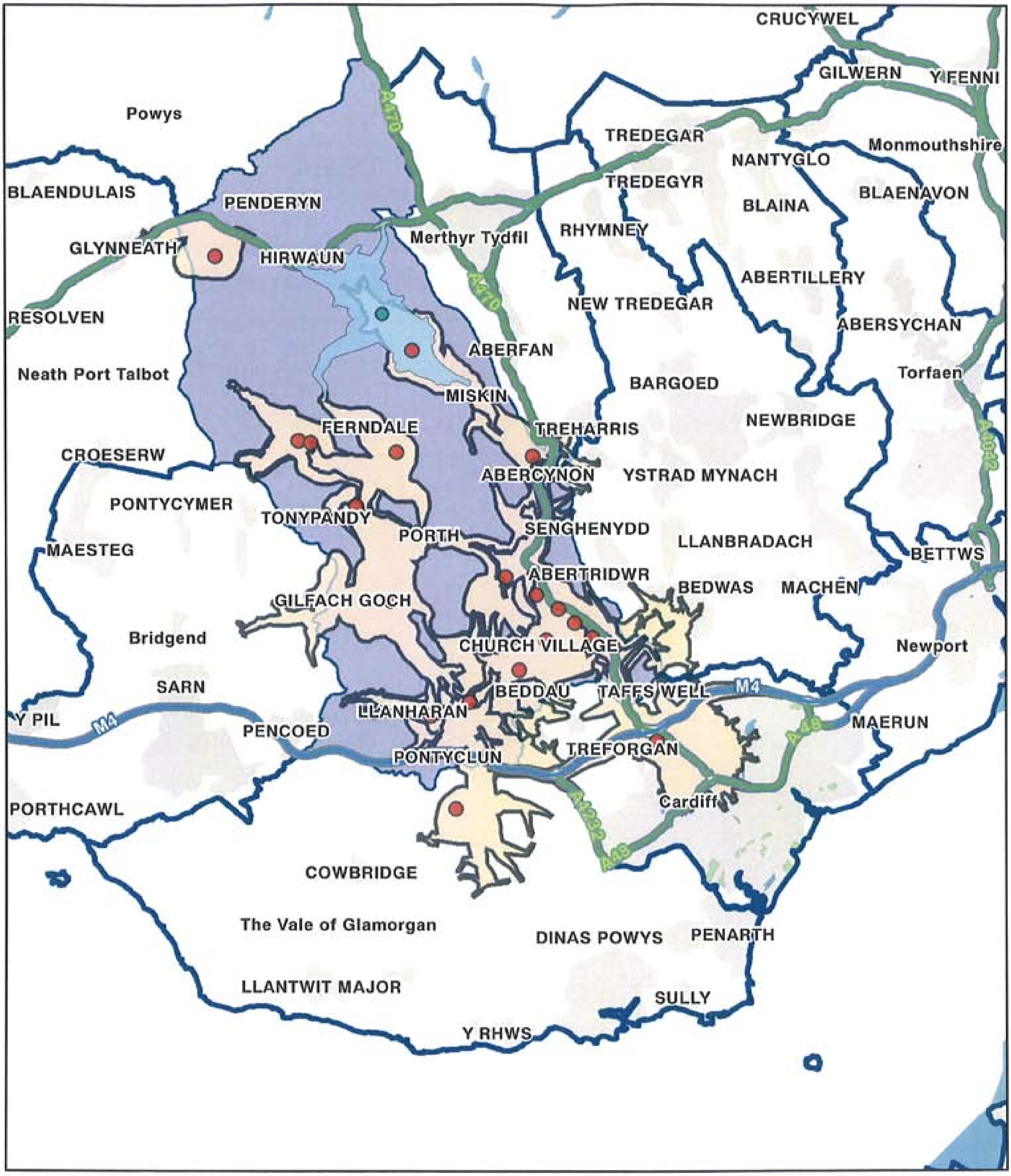
IL30506-011



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Existing Gyns Catchment Area (10 mins drive time)	
Areas of Borough not Covered within Gym Catchments	
Catchment Area of New Gym in Porth	
Potential New Gym in Aberdare	

nlp Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 12** **New Gym Scenario 2**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

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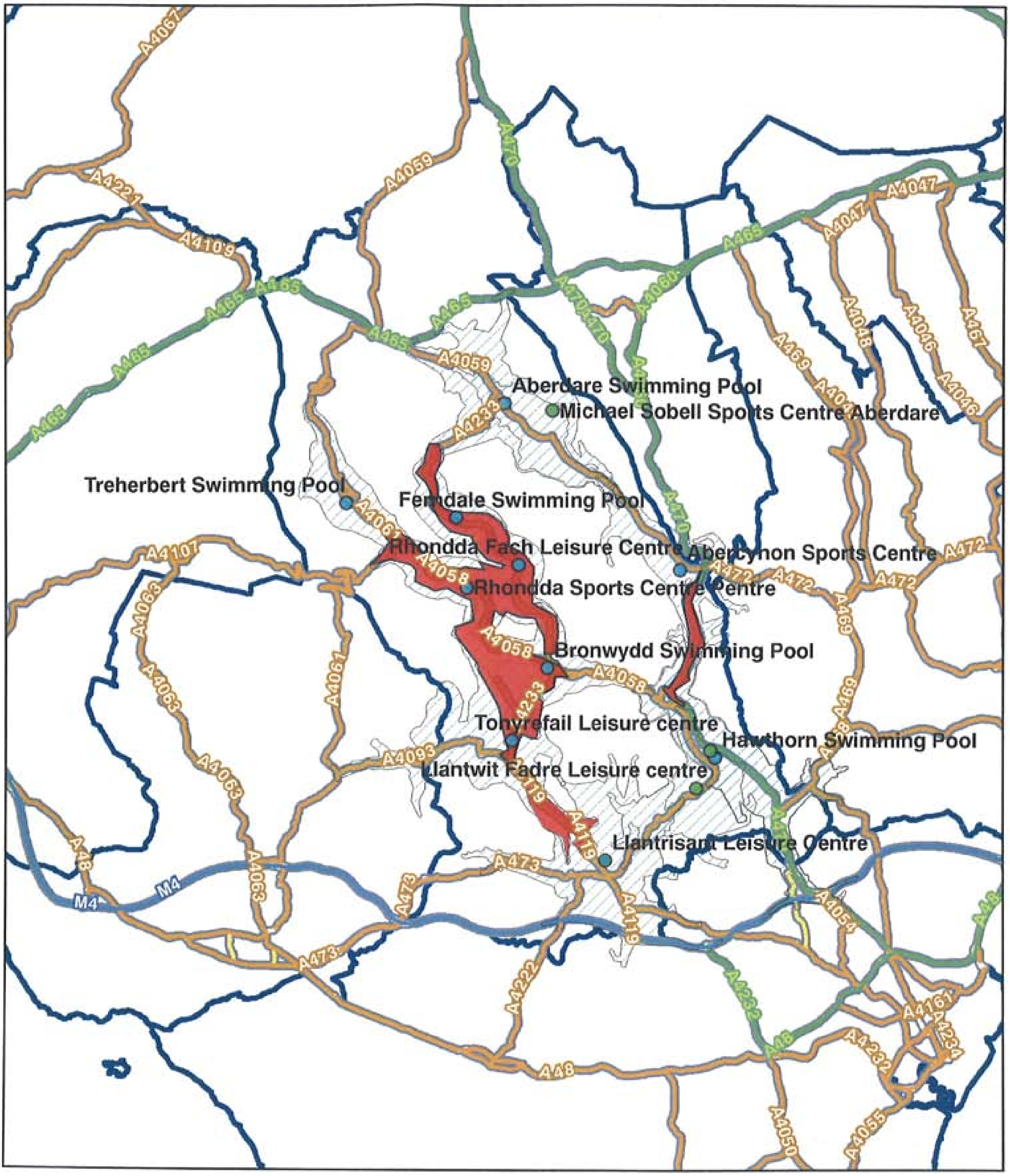
IL30506-012



KEY

Leisure Centres without Pools

Leisure Centres with Pools

Area of overlap between Leisure Centres with swimming pools

10 minute Leisure Centre drive time

nlp Nathaniel Lichfield and Partners

Project	RCT Leisure Study
Title	**Plan 13 Leisure Centre Catchments**
Client	Rhondda Cynon Taf County Borough Council
Date	July 2008
Scale	NTS
Drawn by	IJ
Drg. No	IL30506/001

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